SharpSchool
helping schools succeed

User Guide

Chapter 17

Event Registration

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Introduction

SharpSchool's **Event Registration** is a powerful tool that will allow all users to view and register for upcoming events. This guide is intended for administrators, teachers, parents and students.

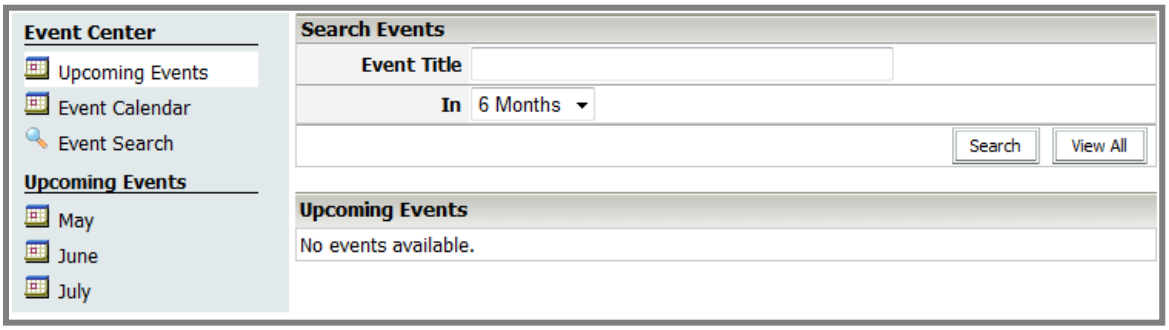
Accessing Event Registration

Event Registration can be accessed through the **Registration** link in the published links section of your website, a link placed manually on your website, or by entering in your website address and adding /ereg to the end. (e.g. http://www.sharpschool.com/ereg).

Your school or organization may require you to enter a username and password for security to be able to access the **Event Registration** pages. This username and password will be provided to you by your site administrator.

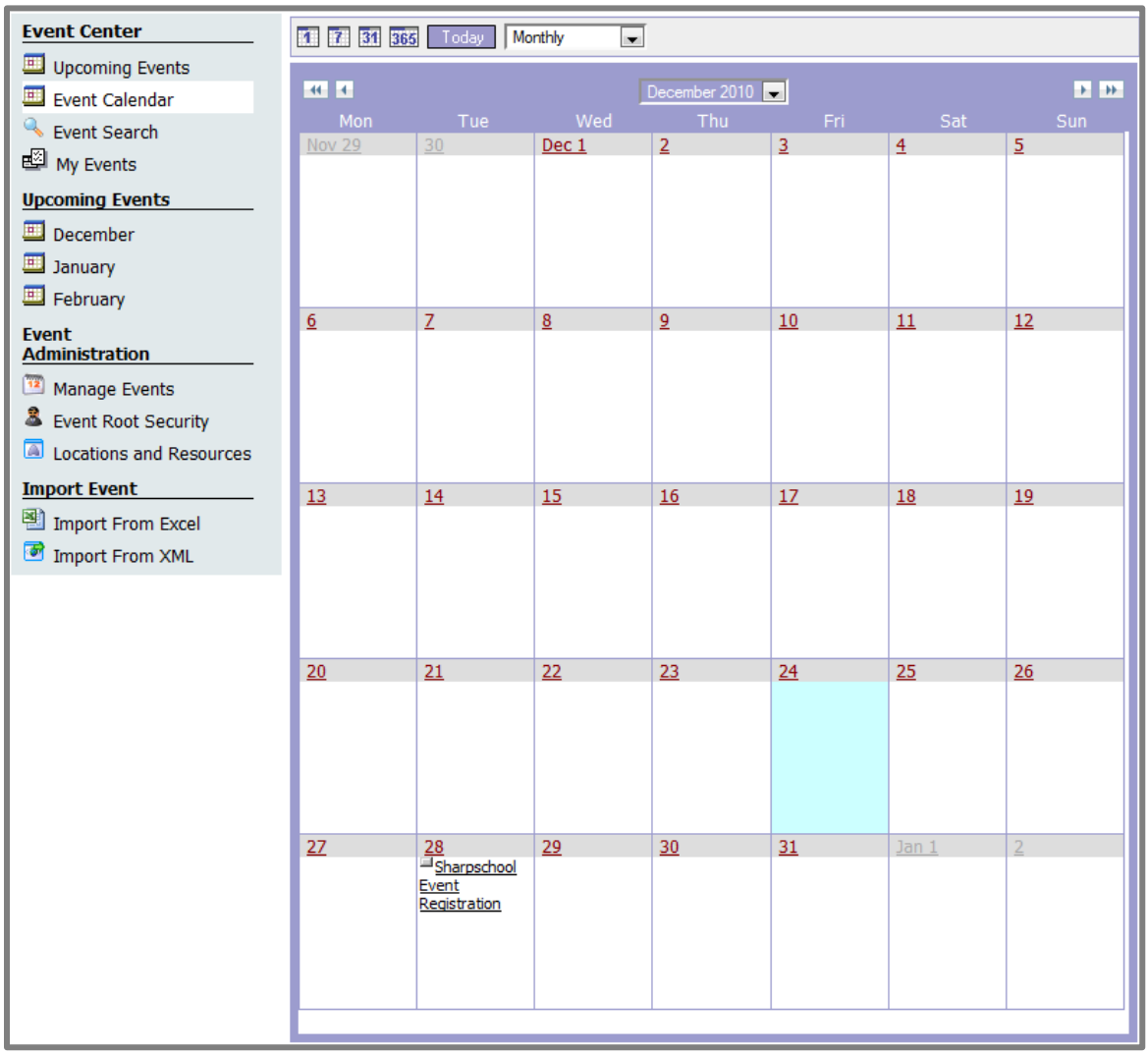
Event Center

On the **Event Registration** page you will see the **Upcoming Events** section for searching events by title and a list of any events upcoming for the next 3 months..



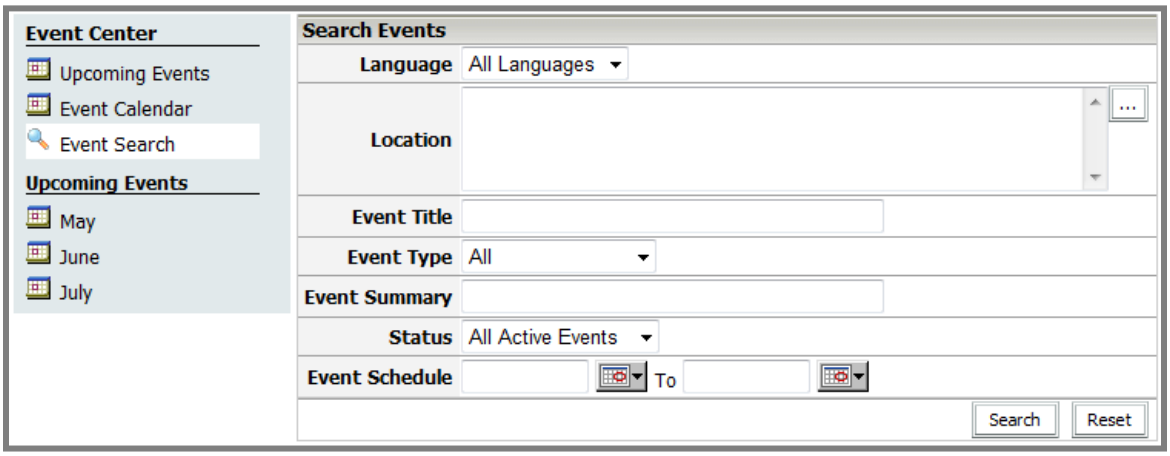
Event Calendar

The **Event Calendar** that is part of the **Event Center** will provide you with a calendar view of the events. When you click on the event you will see the event information as well as the registration link.



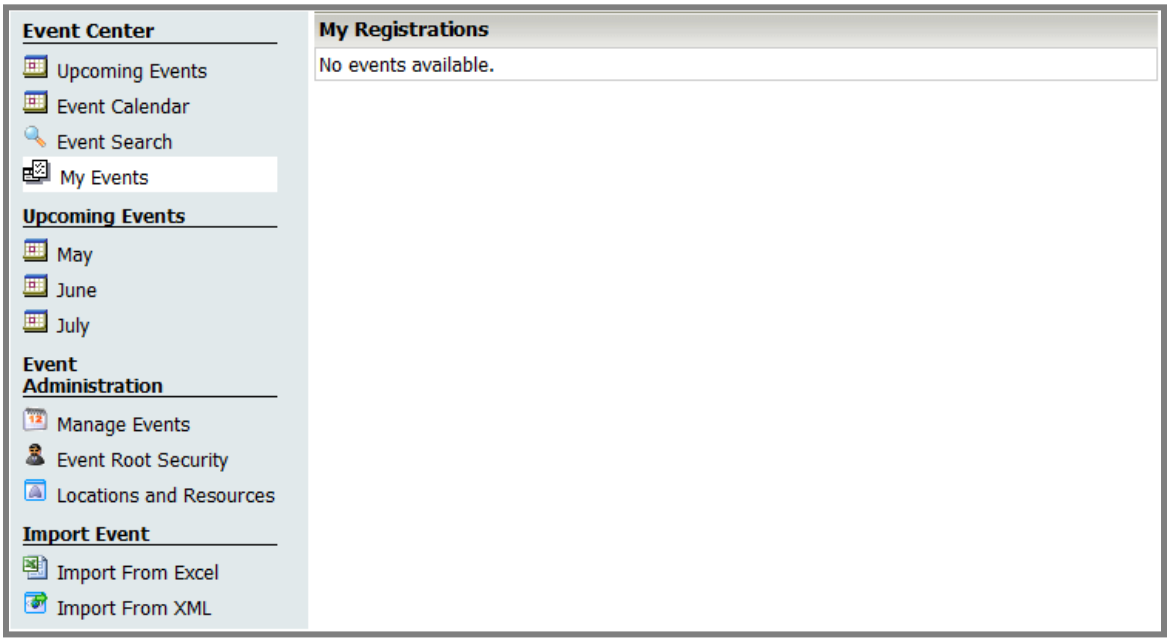
Event Search

The **Event Search** option allows you to search for all events whether they are active or closed. You can search by **Language**, **Title**, **Event Type**, **Event Summary**, **Status**, or even the **Event Schedule**. The search results will appear under **Event Search Results** where you can click on the **Event Title** for more information and to register.



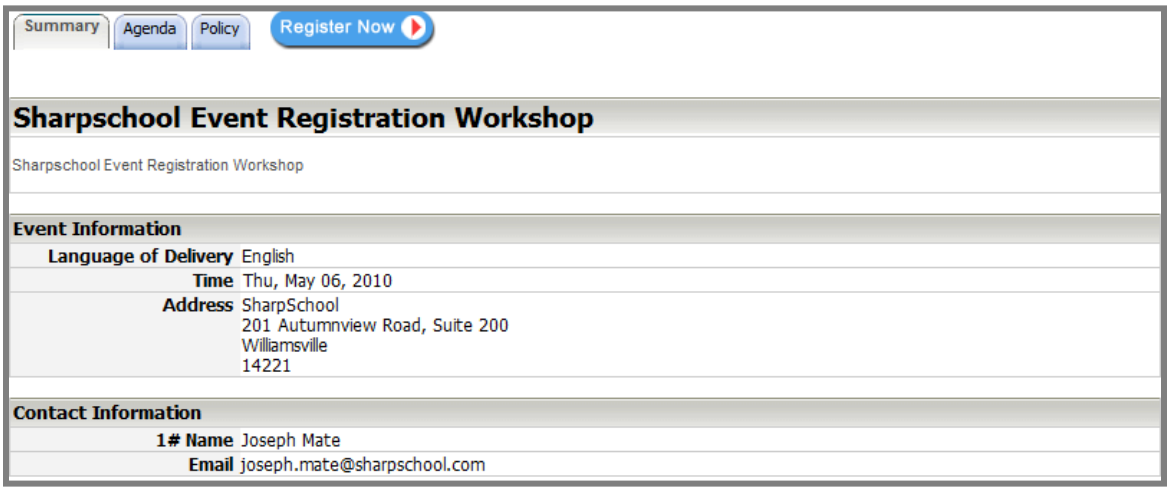
My Events

My Events shows you which events you have registered for. You can cancel your registration under the **Actions** section by selecting the **Cancel** option. You can edit your registration by selecting the **Edit** option from the **Actions** section.

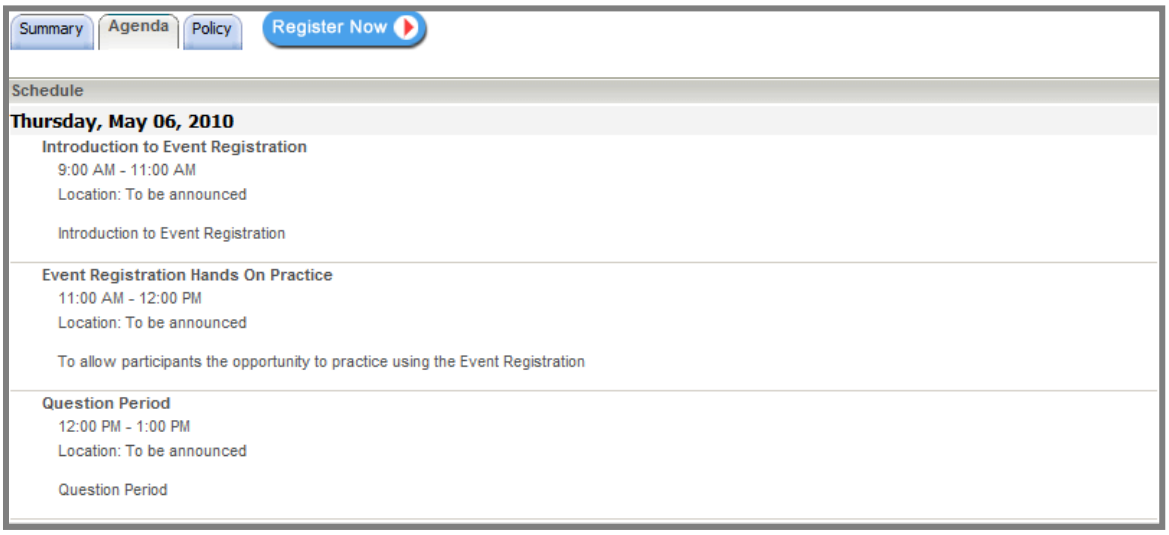


Registering for an Event

When you are registering for an event you will first see the **Event Information** which will include a description, the language of delivery, and the date and time.



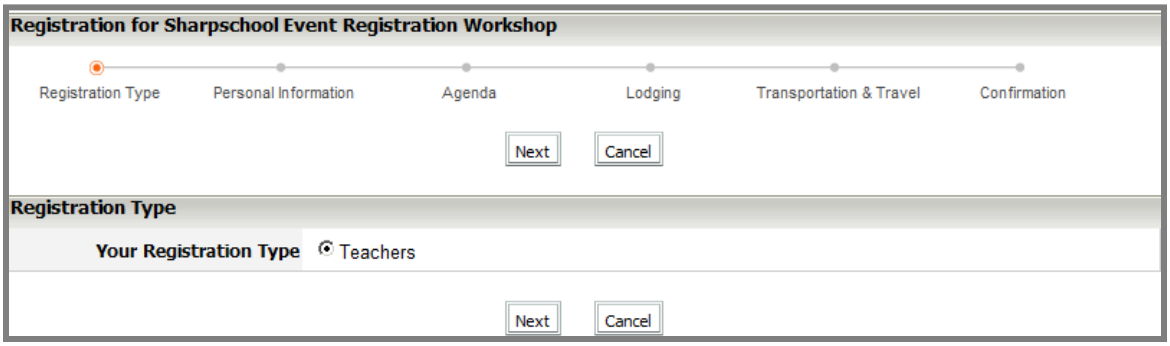
When you click on the **Agenda** tab, this will show you a schedule of items or topics of discussion that are associated with this event.



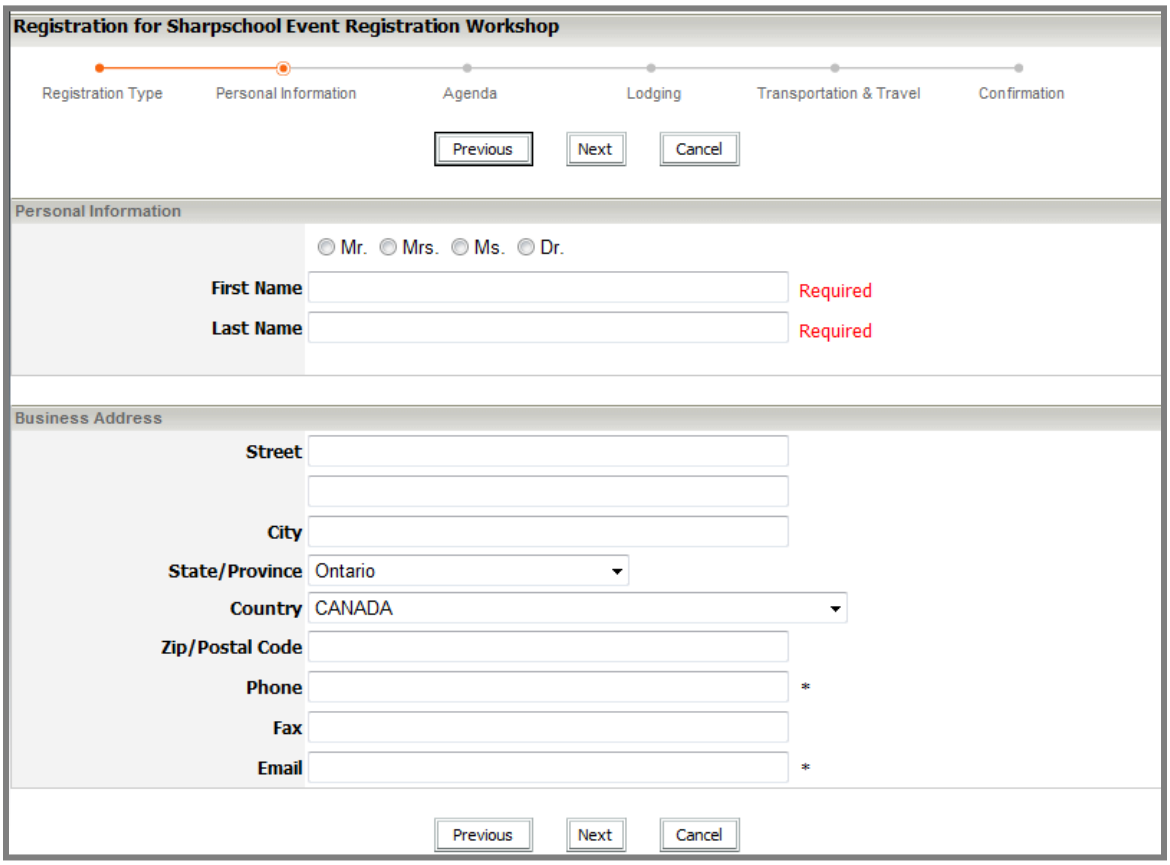
The **Policy** tab will show you any policies that are associated with the event.

When you click on the **Register Now** button you will be presented with the registration information that you will need to select.

First you will see the **Registration Type**. You will be presented with a range of registration types that are applicable to your account. Choose a type and click **Next**.



You will now be asked for your information. Fill out the form completely and then click **Next**.



If there is an **Agenda** it will have sessions that you will be able to sign up for; select the sessions you wish to attend and click **Next**.

Packages

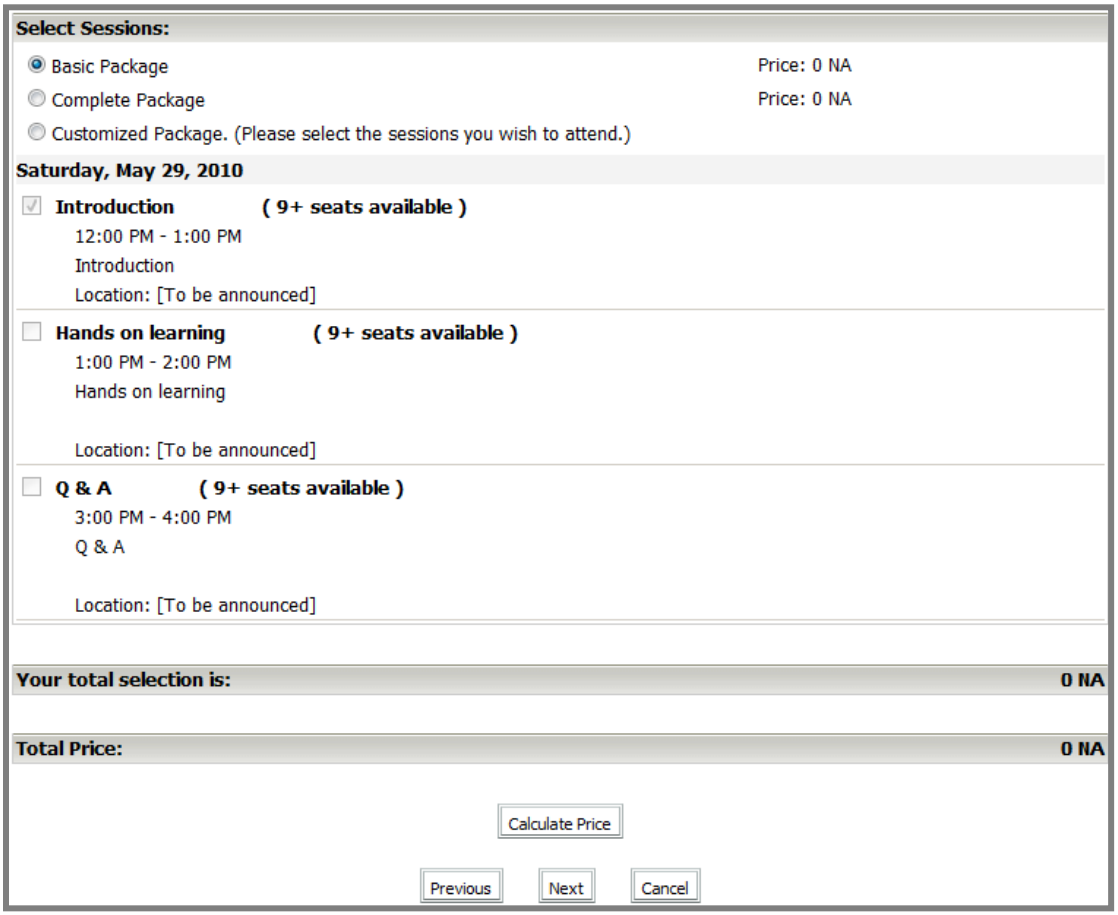
During the registration process there are three different packages that you may select from. There is a Basic Package, Complete Package and a Custom Package.

Basic Package - Includes all sessions in the **Agenda** that are categorized as **Mandatory** or **Regular**

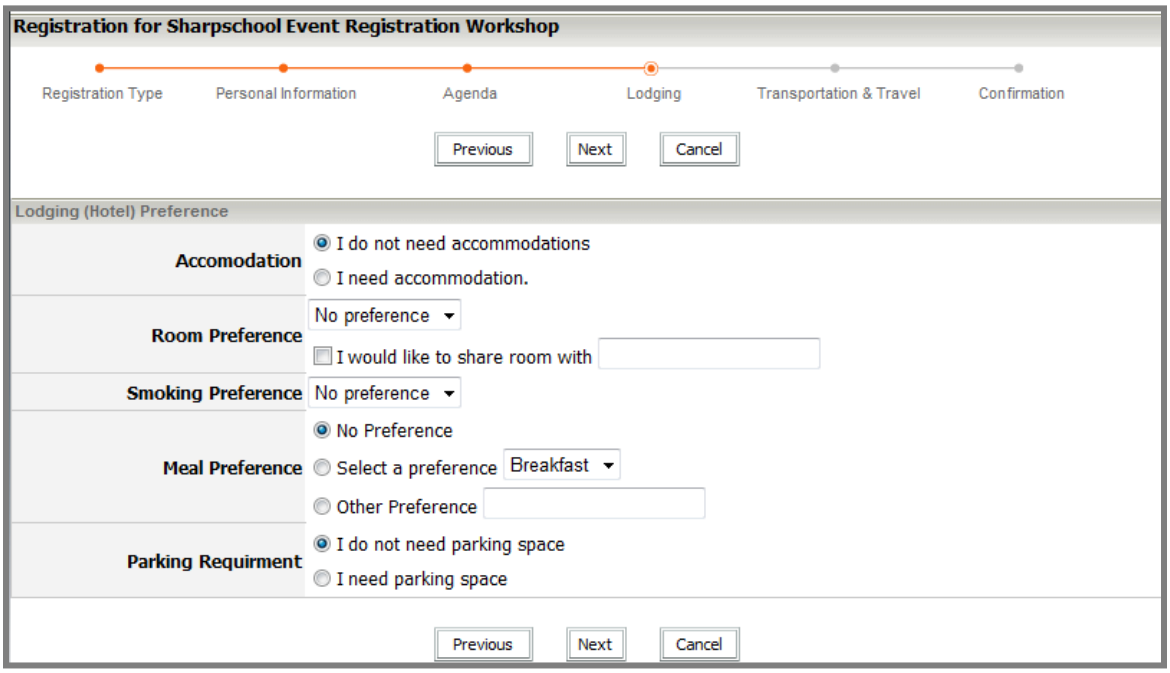
Complete Package – Includes all sessions that are part of the **Agenda**

Customized Package – Includes all **Mandatory** sessions and allows you to pick and choose the **Regular** and **Optional** sessions you would like to attend

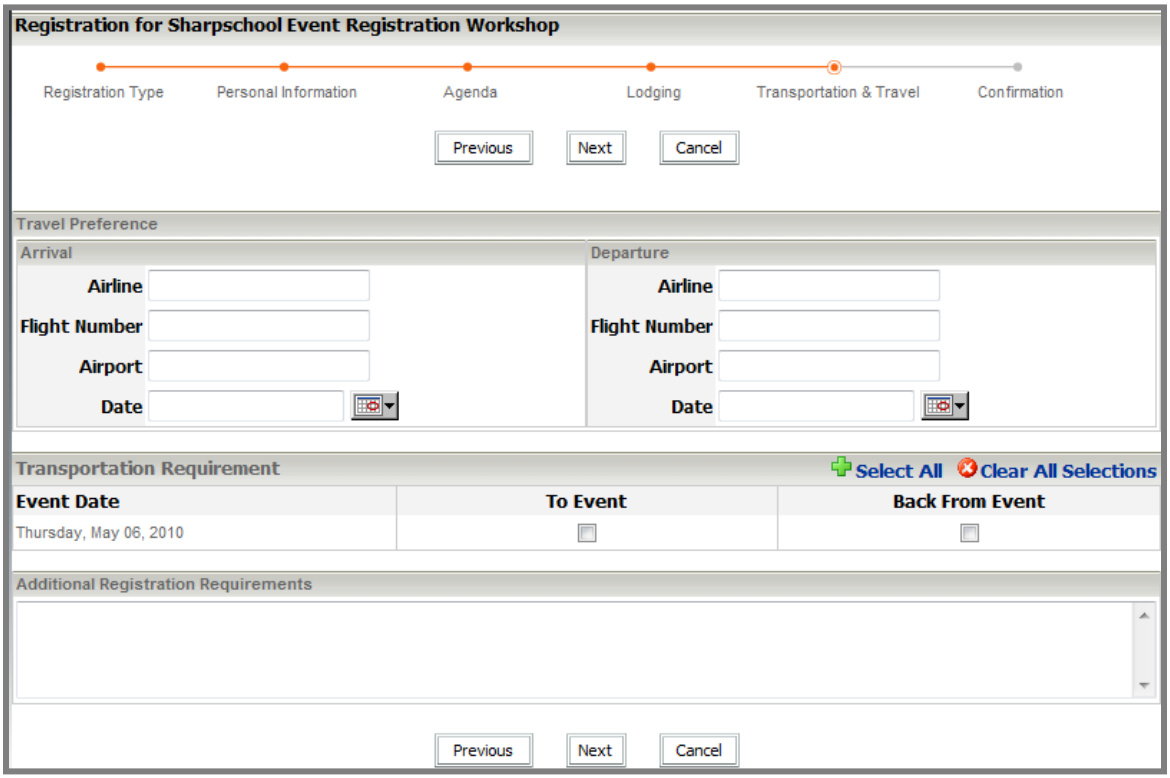
Note: The **Customized Package** option is only available if you have enabled partial registrations when creating the event.



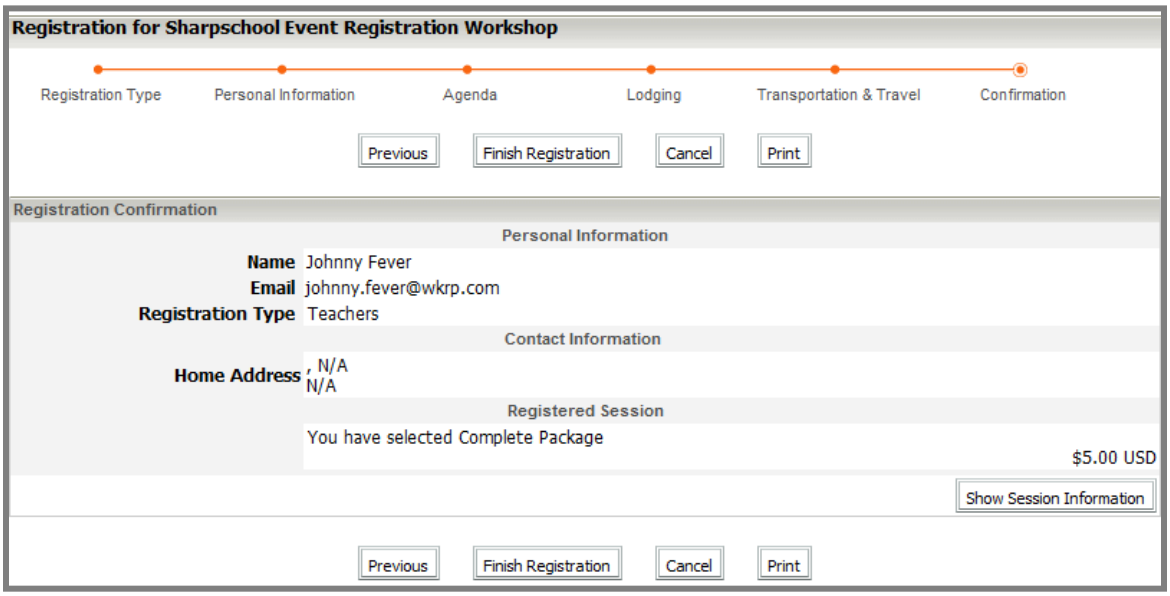
If your event contains a **Lodging** preference section, select the options for **Accommodation**, **Room Preference**, **Smoking Preference**, **Meal Preferences** and **Parking Requirements** and then click **Next**.



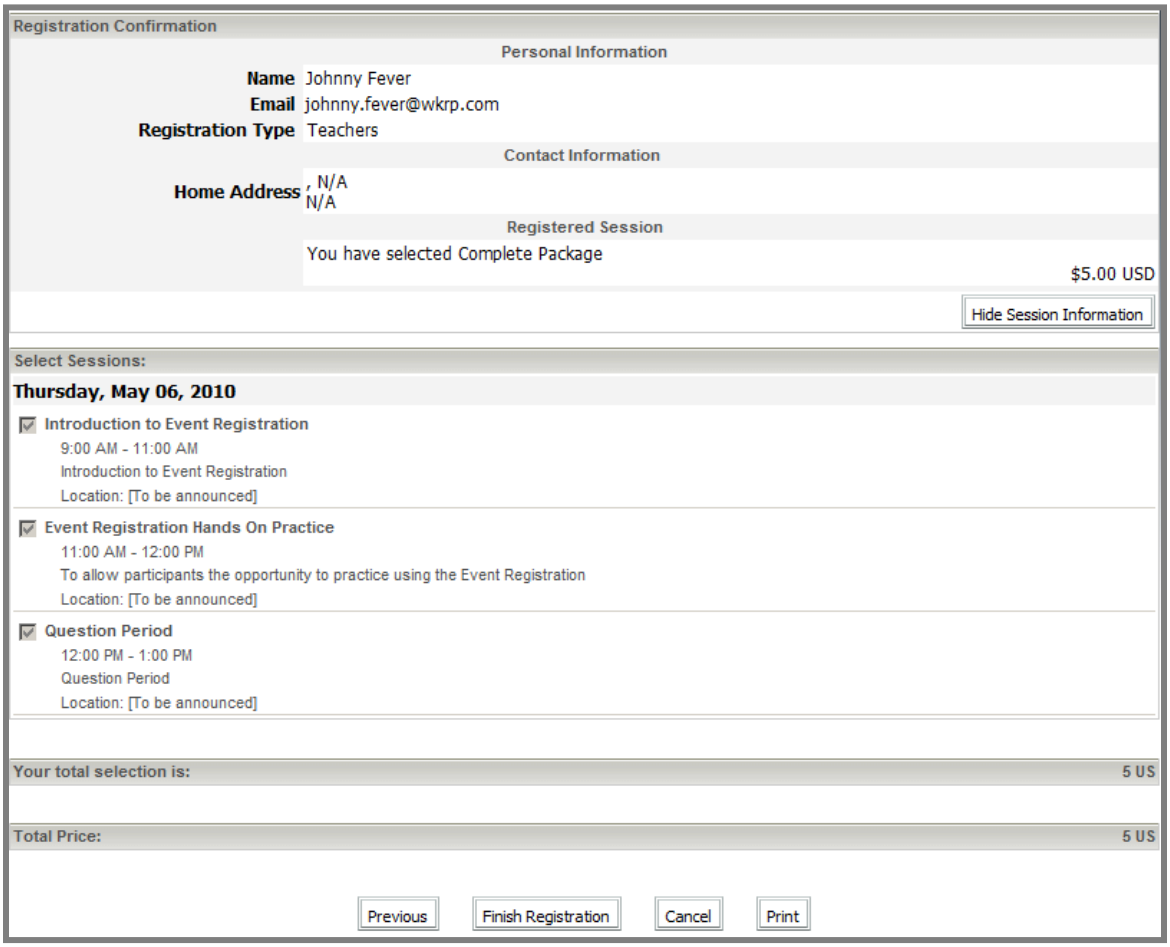
If your event contains a **Transportation & Travel** section, simply fill out the **Travel Preference** including **Arrival** and **Departure** sections with the **Airline**, **Flight Number**, **Airport**, and **Date**. For **Transportation Requirement** you will see the dates of your event; check the boxes for the days you will need transportation **To Event** or **Back from Event**. If you have any other special or **Additional Registration Requirements** you can fill them out in the final space and then click **Next**.



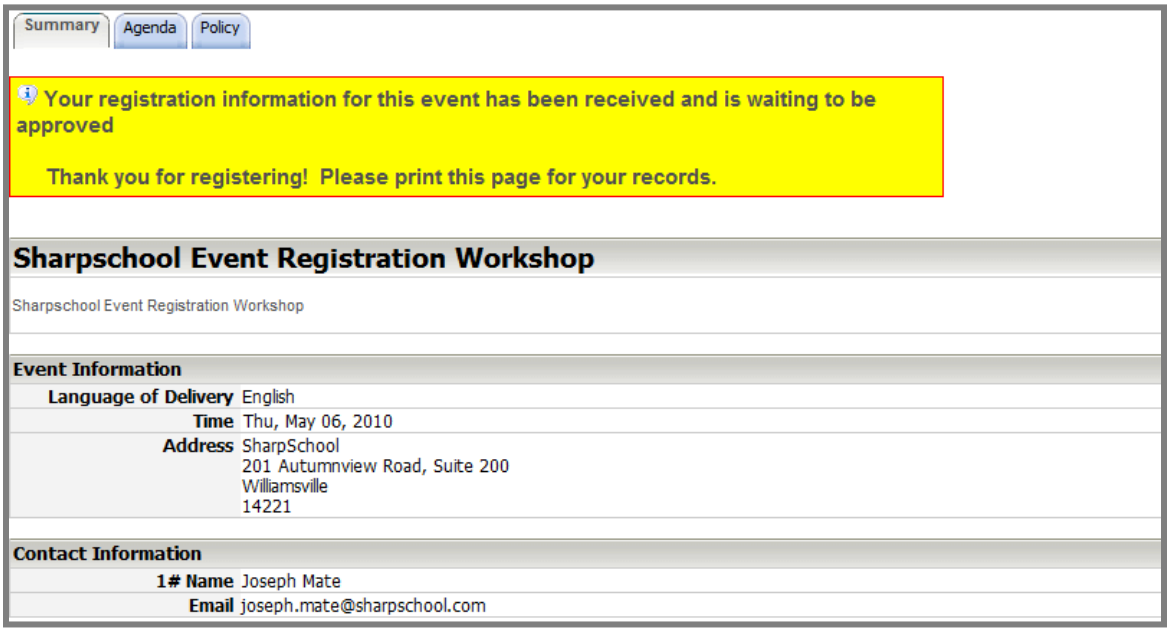
The final screen you will see is the **Registration Confirmation** screen which will summarize your selections as well as any charges associated with your registration and gives you the option to **Print**, **Cancel** or **Finish Registration**.



You can click on the **Show Session Information** which will show the **Agenda** for the event.

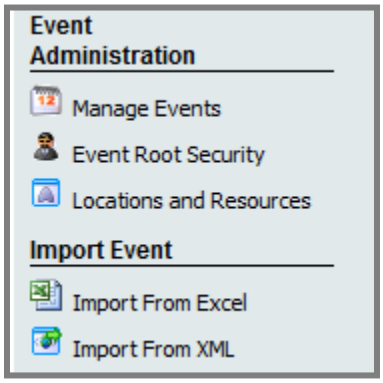


When you click **Finish Registration** you will see a message confirming your current registration status for the event and you will receive a confirmation email.



Event Administration

The **Event Administration** is only available to users who have administrative access or who have been assigned the rights to access the various aspects of **Event Registration**.



Manage Events

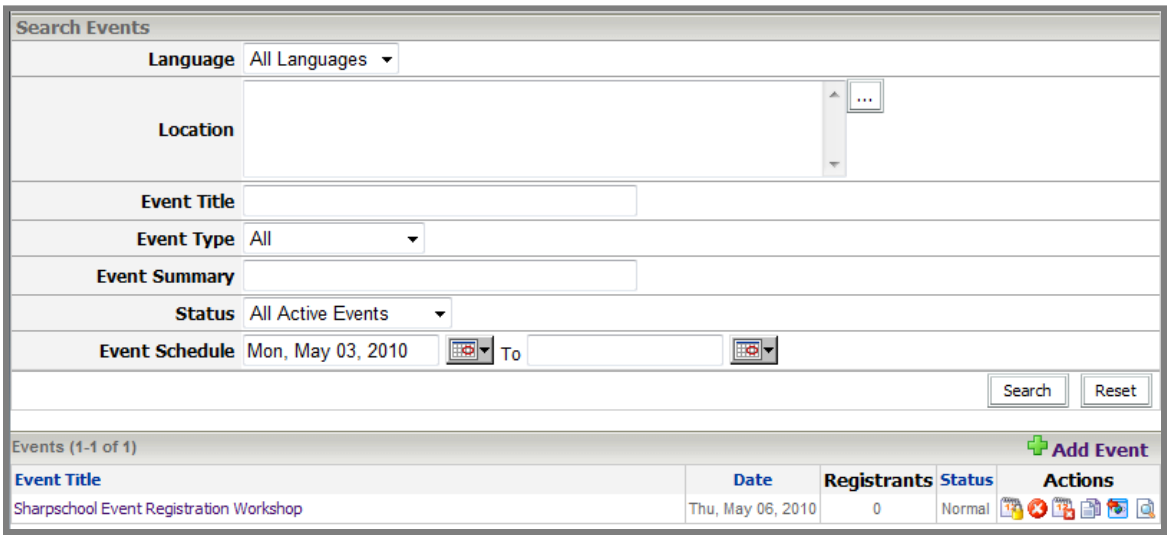
When you open the **Manage Events** screen you will see the **Search Events** and a listing of the events created below. You are able to view the **Title of the Event**, **Date(s)** of the event, the number of **Registrants**, **Status** and **Actions**. The **Add Event** option will allow you to create a new event.

The **Actions** section contains the following options:

1) **Close** or **Open Registration** – Allows the user to manually change the event registration to open or closed.
2) **Delete Event** – Deletes the event from the system.

Pitfall: Once you delete an event you will not be able to retrieve it.

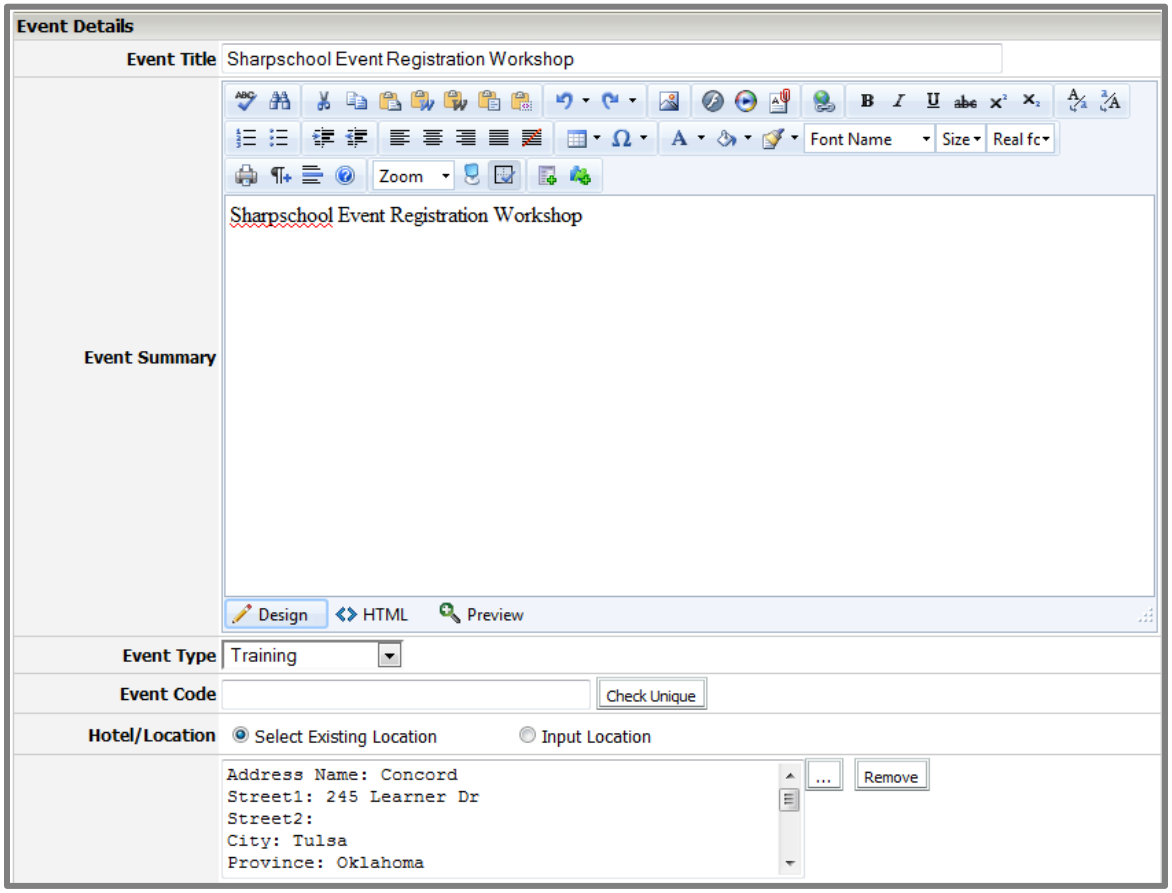
3) **Cancel Event:** Allows you to cancel the event without deleting it from the system.
4) **Copy Event:** You can create a copy of the event to be used again.
5) **Export Event:** The event that you have created will be exported as an XML file which then can be imported into the SharpSchool system.
6) **Preview**: Allows you to preview your event.



Adding an Event

In order to add an event, please follow the steps below:

Basic Information



1) Click on **Add Event**.
2) Enter in an **Event Title** (This is a mandatory field).
3) The **Event Summary** uses the rich text editor, allowing you to add photos, videos, links, and other items as needed.
4) Select your **Event Type** from the dropdown list.
5) If applicable you can enter in an **Event Code**.
6) Enter in the **Location** for the event. If you have defined a location click on the icon and select it from the list. To manually enter in the location select **Input Location** and fill out the information.

   To define a location for the event you can follow the steps in the *Location and Resources* found on page 37.
7) Choose your **Language of Delivery** from the dropdown menu.
8) Set a maximum capacity limit by entering a number in the **Maximum Capacity** field.
9) Enter in the **Date(s)** and **Time** of your event. If this is an all day event you can select **Ignore the time**.
10) The **Time Zone** should be automatically selected; if it is incorrect you can select your correct **Time Zone** from the dropdown menu.
11) To select **Registration Contact(s)** click on the icon at the end of the field. If the contact you want to add is not there, your website administrator will need to create an account for them.
12) If your registration requires payment select the **Online Pay Account** from the dropdown menu. The online payment needs to be configured from the **System Administration** section of your website. For more information on how to configure the **Online Pay Account** please see
13) Additional options that you can select:
    a. **Disable online registration:** Do not allow online registrations. All registrations will have to be added manually by an **Event Administrator**.
    b. **Enable waiting list:** This allows you to have a waiting list for the event. If the event has reached capacity, users who attempt to register will be placed on the waiting list.

c. **Manually move registrants on waiting list when there are available spaces**: Will make administrators responsible for manually moving people from the waiting list to the approved list. If this is not checked, users will automatically be moved from the waiting list to the approved list as soon as space is made available.

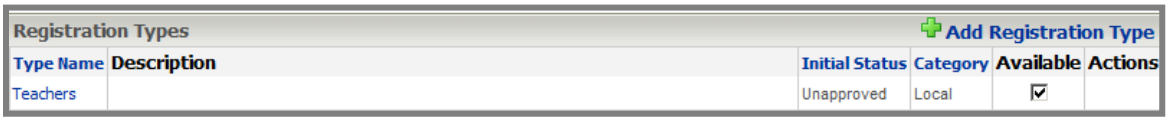
d. **Users can register after the event has started:** This allows users to continue to register after the event has begun.

e. **Enable partial agenda session registration:** Enabling this option allows users to register for specific agenda items without needing to participate in the full agenda. This can be useful if you have an event like a multi-day conference where not all registrants will be attending every session or even every day of the conference.

14) When you have completed filling out the event information click **Add Event**. You will now see **Tabs** across the top and will be on the **Event Information Tab** inside the **Basic Information Tab**.

    At anytime that you decide that you want to cancel, at the bottom of the form click on **Cancel**.

Registration Types



If there is no **Registration Type** then you will need to create one by clicking **Add Registration Type**.

1) Enter in a name for your **Registration Type**.
2) Create a **Description** which can include pictures, videos and links to resources.
3) Add the appropriate **Associated User Groups**.

   This is a mandatory field and you need to choose the associated user groups that will be allowed to register for the event. The user groups are created under **Administration** -> **System Administration** -> **Manage Groups and Roles**. If a group of users that you want to add is not available, you will need to create the group or have your site administrator create the group for you.

Tip: If you would like to make registration type for all users, choose the **Registered Users** group.

4) Select an **Initial Registration Status** from the dropdown menu.

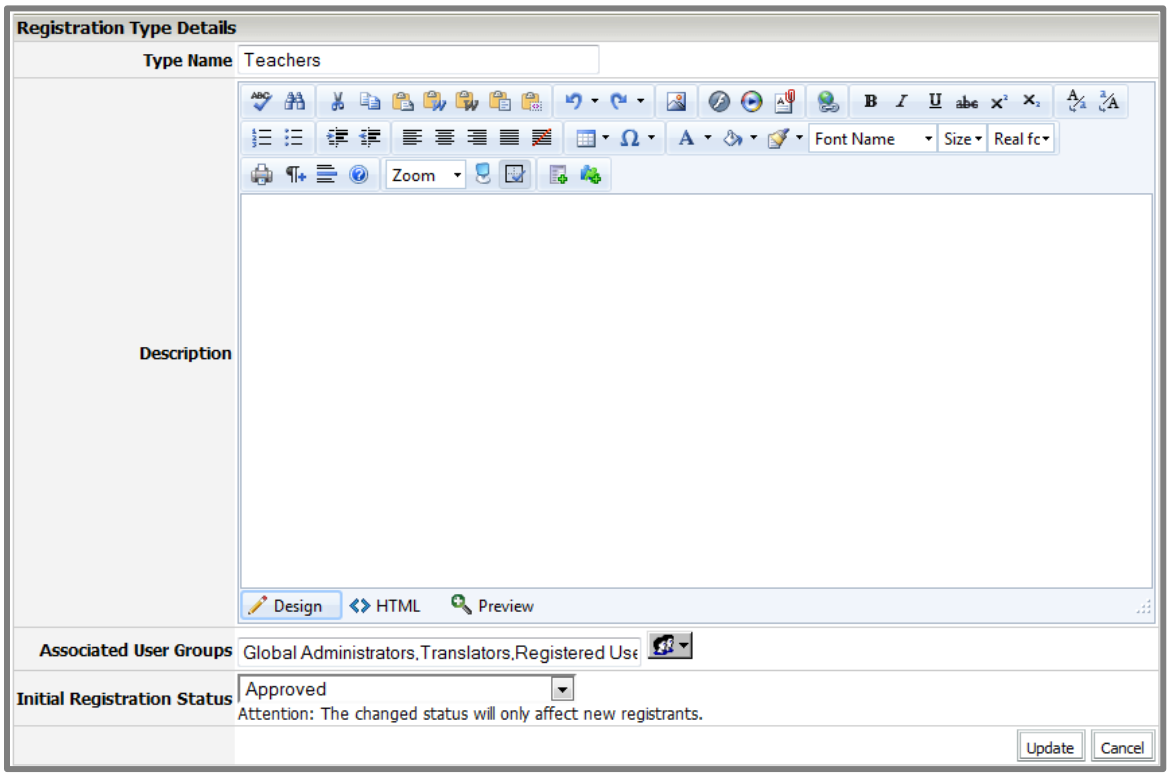
   The **Initial Registration Status** of a registrant can be set as the following:

   Approved: The user or registrant will automatically be approved and registered for the event unless there is a wait list. If there is a wait list then the user or registrant will be unapproved until there is a spot open.

   Unapproved: Registrant will need to be approved by the registration contact that was defined earlier in the basic information tab or a site administrator.

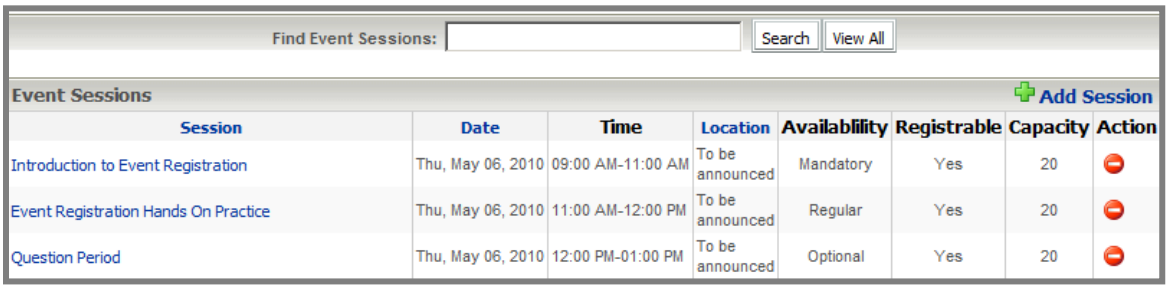
   Unapproved until payment received: You can select this option if you want your users or registrants to not be approved until payment has been received.

5) Click on **Add Registration Type** to save and complete.



Agenda

The agenda allows you to add event sessions as part of your event. You can create multiple sessions for your event. This is optional when creating your event.

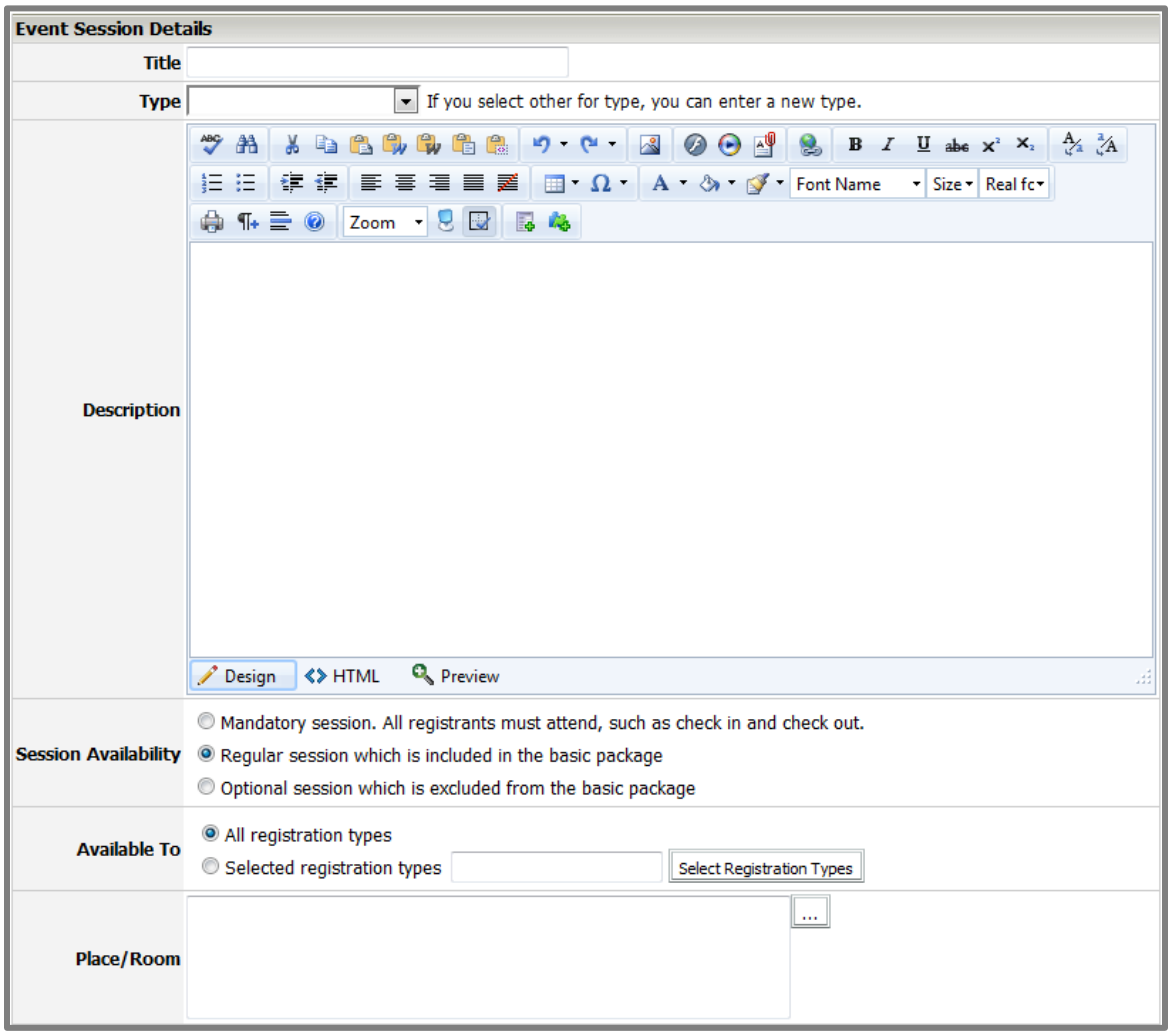


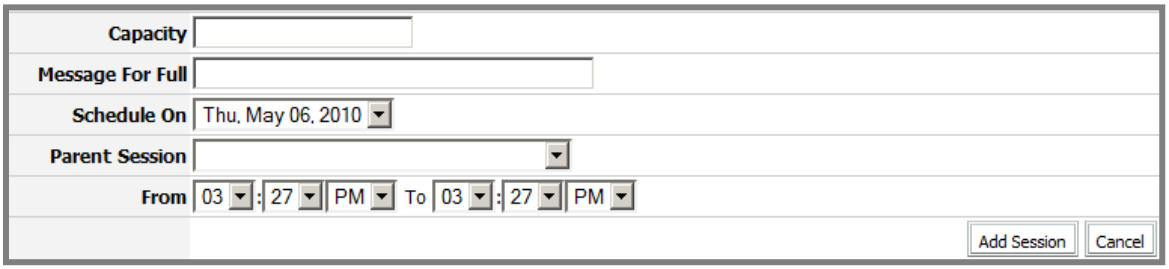
Session	Date	Time	Location	Availablility	Registrable	Capacity	Action
Introduction to Event Registration	Thu, May 06, 2010	09:00 AM-11:00 AM	To be announced	Mandatory	Yes	20	
Event Registration Hands On Practice	Thu, May 06, 2010	11:00 AM-12:00 PM	To be announced	Regular	Yes	20	
Question Period	Thu, May 06, 2010	12:00 PM-01:00 PM	To be announced	Optional	Yes	20	

1) To create an event session click on **Add Session**.
2) Enter in a **Title** for the session.
3) Select the **Type** from the dropdown menu.

   The type of registration you can select will organize your agenda sessions and when you are using the reports will be able to use the search function for type.
4) Enter in a **Description**.
5) For the **Session Availability** select what you feel is appropriate for your event. You can make your session available to all registration types or only selected registration types by clicking **Select Registration Types**, selecting the **Registration Type**, clicking on **Add Selected** and then clicking **OK**.
6) For the **Place/Room** click on the ... button to select an available room.
7) The **Capacity** is the number of registrants who may sign up for a particular session.
8) Enter in a **Message For Full** session message.
9) Select the date for your session from the **Schedule On** dropdown menu.
10) If a **parent** session is available, select it from the dropdown menu.

    A parent session is an existing session, that when selected, will allow the current session to occur concurrently with the parent session (and with any sibling sessions).
11) Select the **Time** for this session.
12) Click **Add Session** to save and complete.



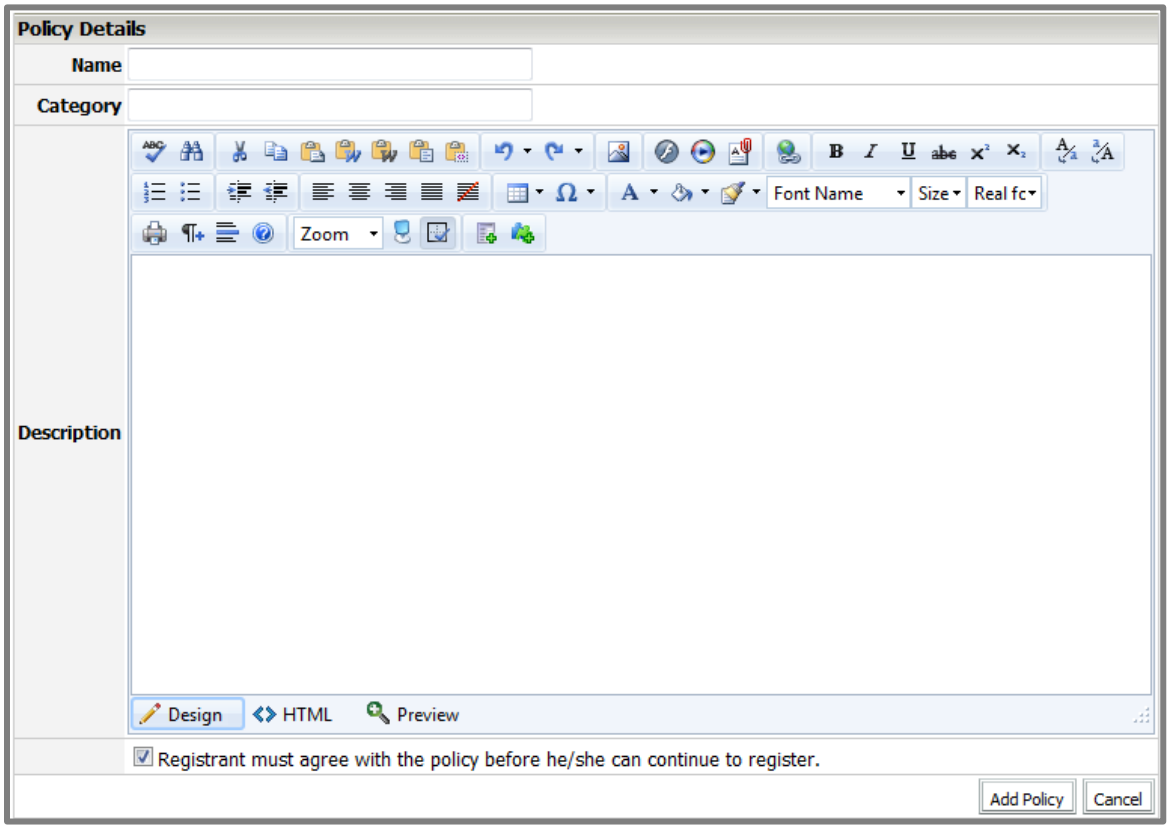


Policies

If your event has any policies that registrants need to be aware of you can enter them on this tab. For example if your event needs to have a user or registrant agree to a privacy policy you would add it here.

To add a policy, follow the steps below:

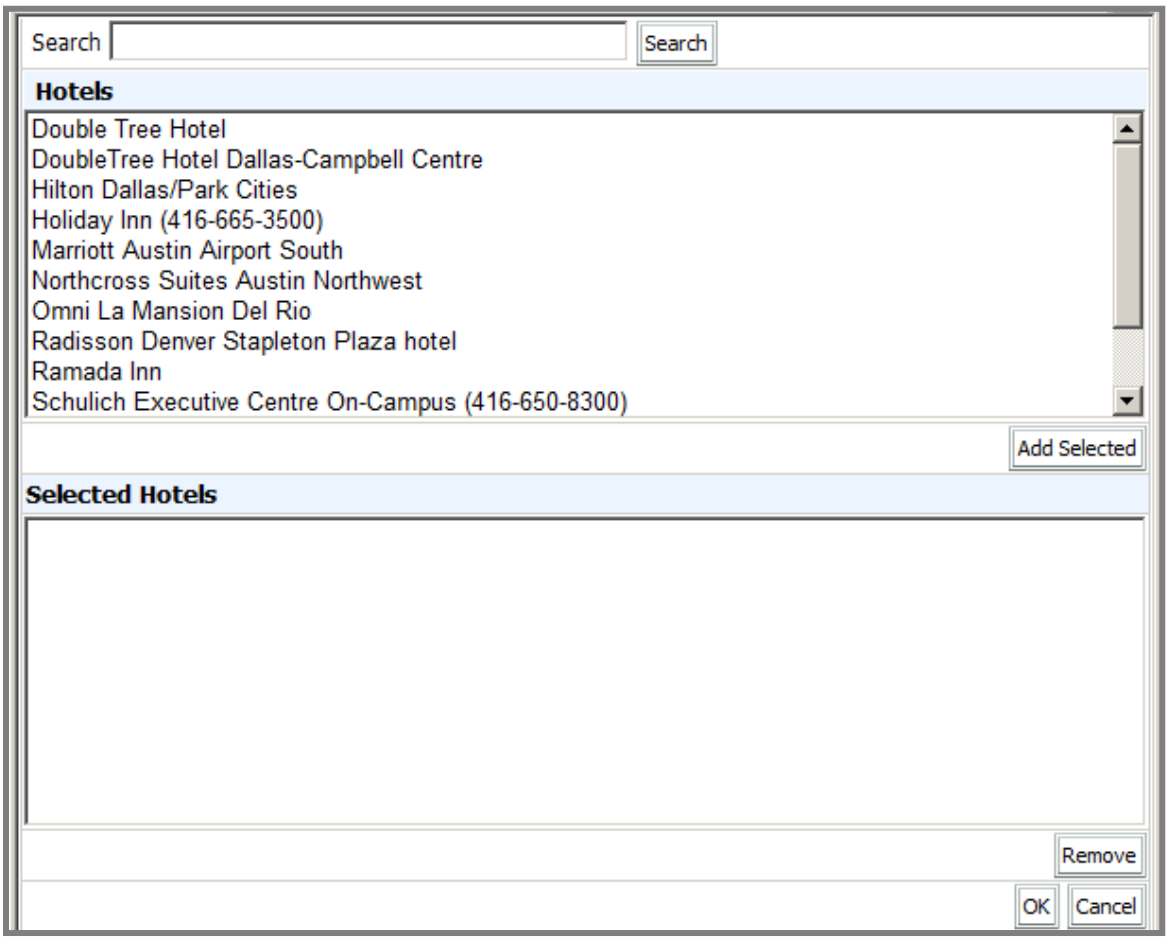
1) Click on **Add Policy**.
2) Enter in the **Name** of the policy.
3) You can enter a **Category** if needed.
4) In the **Description**, enter in the policy information.
5) Check **Registrant must agree with the policy before he/she can continue to register** if the policy is mandatory.
6) To save the policy click **Add Policy**.



Lodging

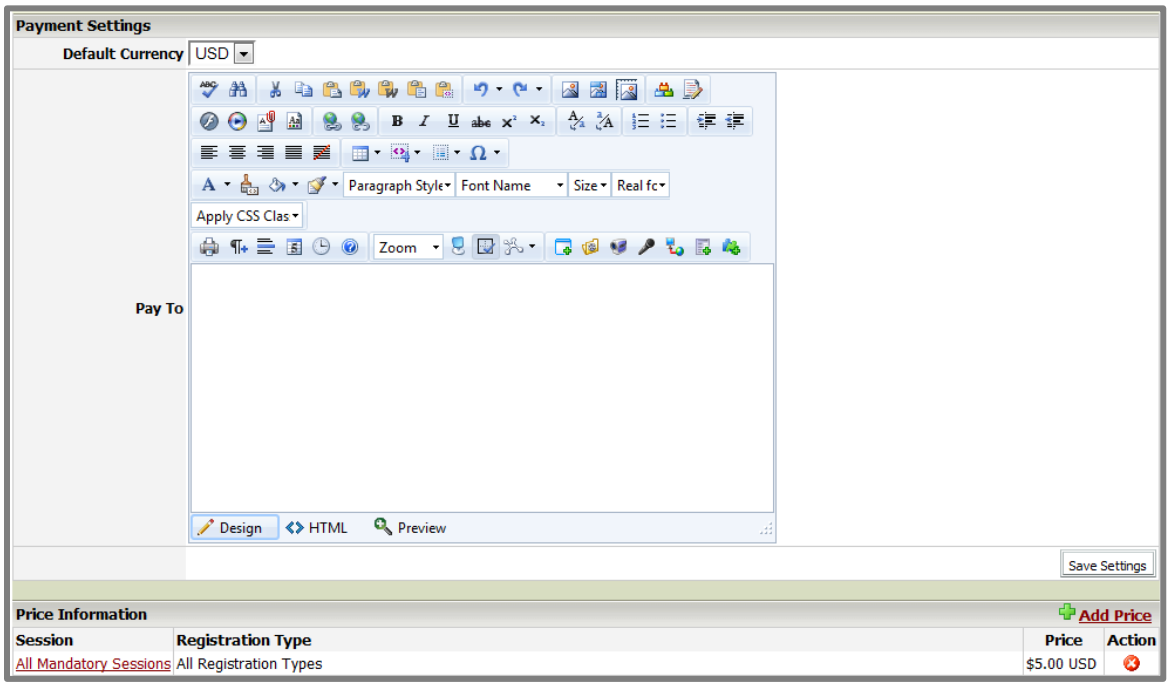
Some events that you create may require a registrant to select a meal plan or have a place to stay.

To add a hotel, click on **Add Hotel**. Select a hotel or multiple hotels from the list and then click on **Add Selected**. To save your choices click **OK**.



To add a meal type click **Add Meal Type**, enter in the **Meal Type** and then click **Add**.

Setting Prices



Prices are optional for your event. To configure the **Payment Settings** follow the steps below.

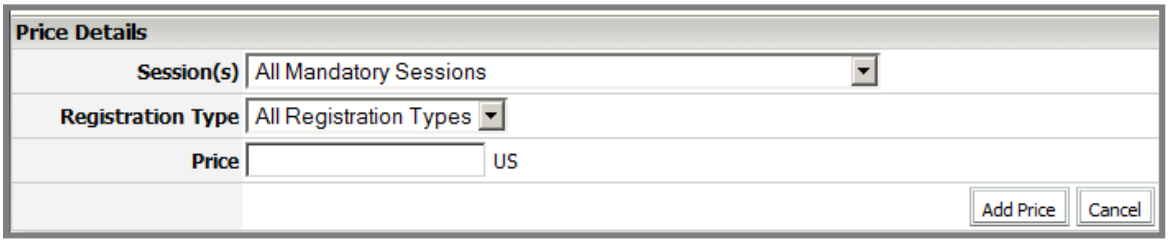
1) Select the default **Currency.** The default **Currency** is configured by your site administrator. To add a default Currency click on **Administration** -> **System Administration** -> **Manage Currencies** and click the radio button in the **Default column** beside the currency that is appropriate.

Note: The currency must be set to **Enable** in order to be the default currency.

2) Select a currency from the dropdown menu. Enter your organization's accounts receiveable information in the **Pay To** field.

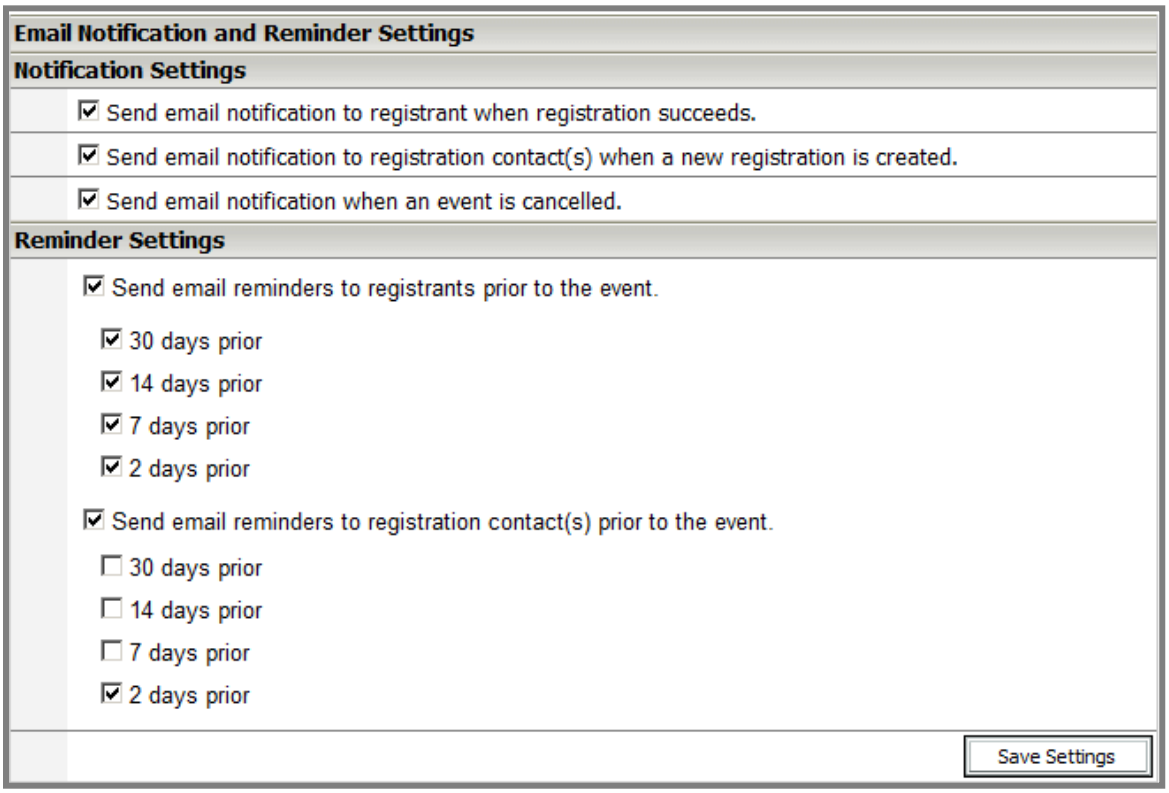
3)

If you want to charge for your event sessions under the **Agenda** click **Add Price**.



From the **Session(s)** dropdown menu choose which session or sessions you would like to apply the price to, and then select the **Registration Type** and enter your price below. Click **Add Price** to save your changes.

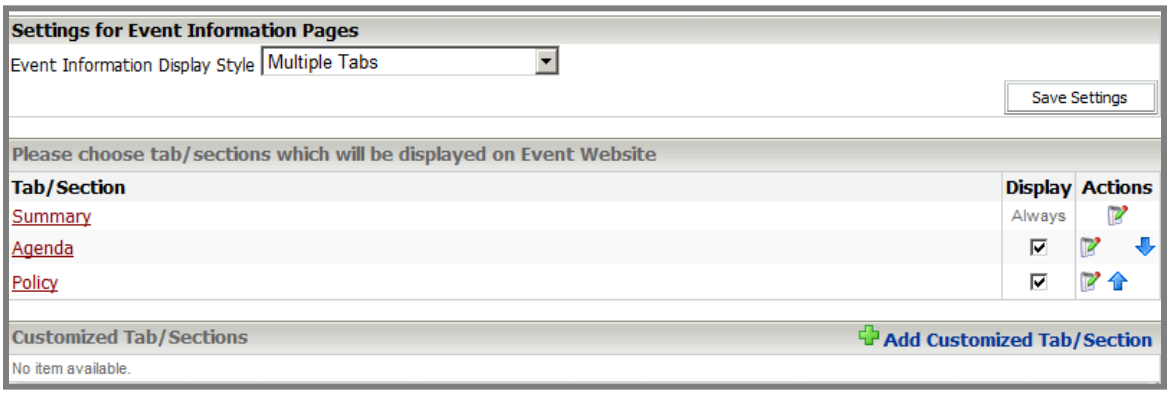
Sending Notifications



You can have your event notify the **Registrant** as well as the **Registration Contact(s)** to send an email notification for the following situations:

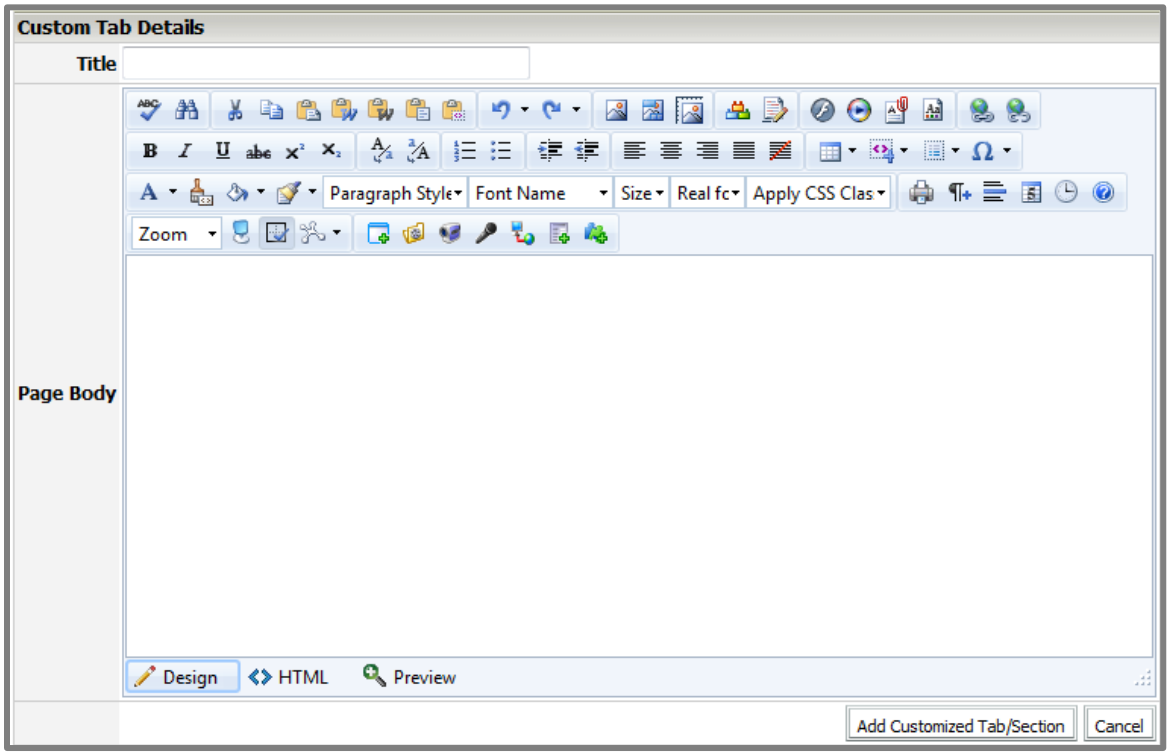
1) Email notification to the registrants when registration succeeds.
2) Email notification if the event is cancelled.
3) Reminder to the registrant prior to the event at intervals of 30, 14, 7, and 2 days prior to the event.

Tabs/Sections



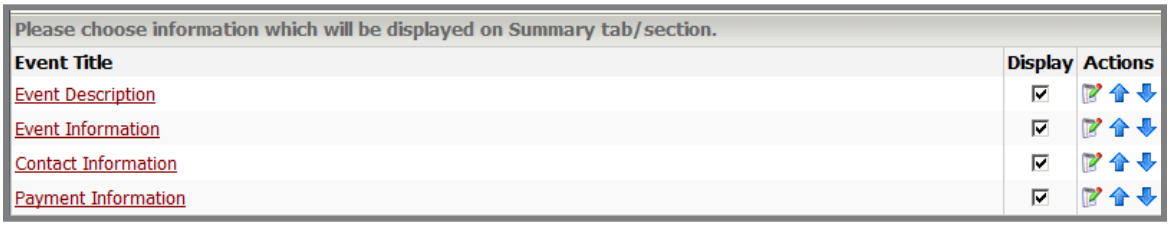
You can use this section to configure the way **Event Registration** is presented when a **Registrant** fills out the form. On the **Event Information** page you can have a **Multiple Tab** view or **Multiple Sections on One Page** view. Click **Save Settings** to keep your changes.

Next you can decide if you want the **Agenda** or **Policy** sections to display by checking the boxes under **Display**. The **Actions** section will allow you to change the order of the tabs by using the arrows or you can edit the name of the tab. If you want to make a customized tab/section click on **Add Customized Tab/Section,** enter in a **Title** and fill in the **Page Body**, and then click **Add Customized Tab/Section** to save.



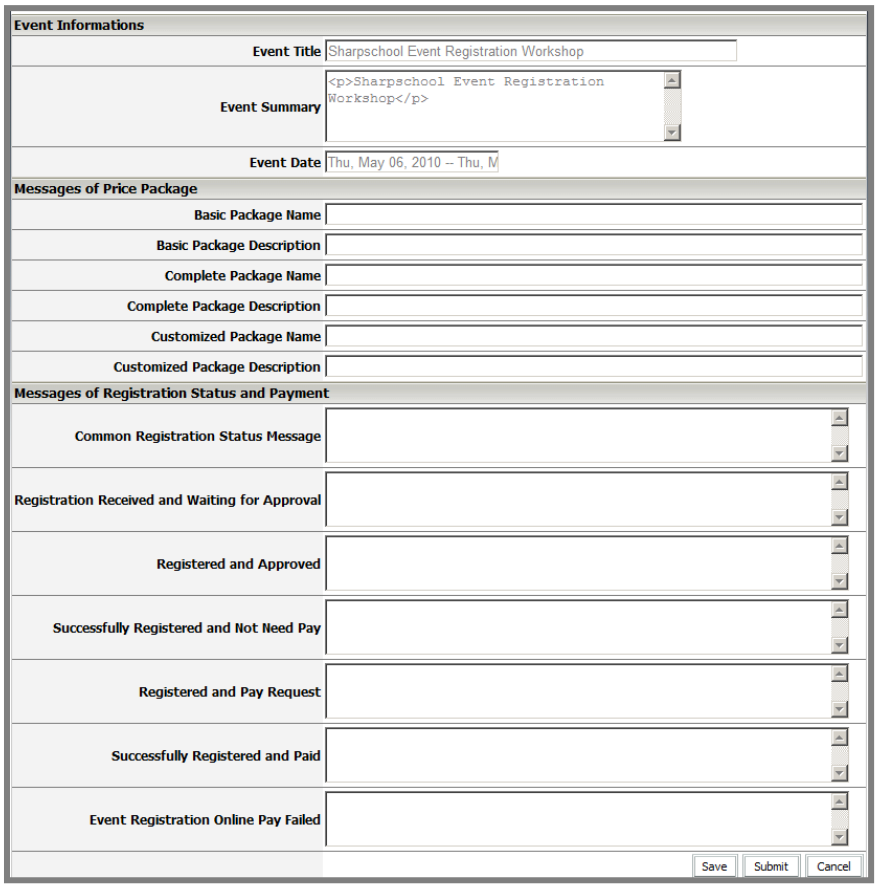
Summary Tab/Section

This section will allow you to define which information will be displayed on the **Event Registration Summary** screen once the registrant gets to that point in the registration. You can also edit the name and change the order of the fields using the notepad icon and the arrows in the **Actions** column.



Event Messages

The **Event Messages** section allows administrators to add messages that the registrant will see on the screen. In the **Messages of Price Package** section you can enter in the names and descriptions of each package. For **Messages of Registration Status and Payment**, enter in the message that you would like the registrant to see. To save all of your changes click **Submit**.



Registration Form

General Tab

You can choose which information is to be included on your **Event Registration Form**. If you do not want a section to be **Visible** uncheck the box. To edit the **Name**, click **Edit** and to change the order, use the blue arrows in the **Actions** column.

Information

Information Sections	Description	Visible	Actions
Personal Information	Registrant's Personal Information	☑	
Agenda	Registrants can choose any sessions which they would like to register to.	☑	
Lodging	Lodging Preferences, Meal Preferences and Other Preferences.	☑	
Transportation & Travel	Transportation Requirement and Travel Preferences	☑	
Policy	Show up all policies applied to this event	☑	

Registrant Info

You can use the **Registrant Info** tab to define what information is required to be filled out on the registration form. Simply check the box, under the **Visible** column, of the item(s) you want registrants to fill out. You can change the order by using the blue arrows in the **Order** column.

Personal Information

Attribute Name	Visible	Order
Salutation	☐	
First Name	☑	
Last Name	☑	
Job Title	☐	
From Sponsor	☐	
Business Address	☑	
Home Address	☐	

Other Information

Attribute Name	Visible	Order
Organization/District School Board	☐	
Employer/School	☐	
Emergency Contact Name	☐	
Emergency Contact Phone	☐	
Social Insurance Number	☐	

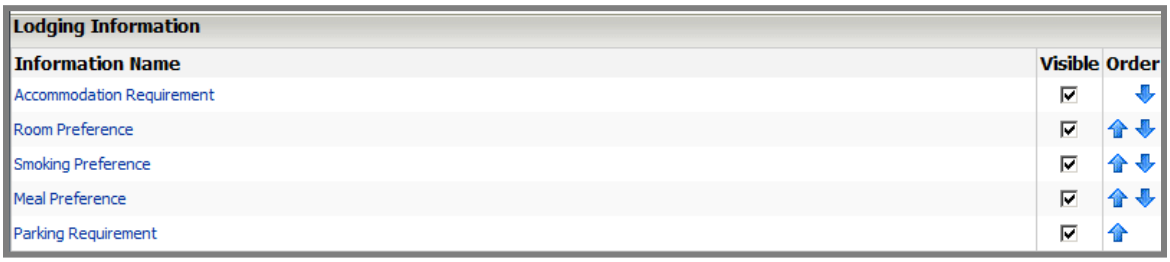
Custom Attributes Add Custom Attribute Delete All

No data availabe

If you need to add a field or section to your form that is not already listed you can use the **Custom Attributes**. To add a **Custom Attribute,** click **Add Custom Attribute**, enter in the name of the attribute, select the **Data Type** and then click **Add**.

Lodging

The **Lodging** tab will allow you to change the option to make the **Lodging Information Visible** on the registration form, as well as the **Order** the on the form by using the blue arrows to move the preferences up or down.



Travel

The **Travel** tab allows you to make the **Transportation Requirement**, **Arrival Information**, and **Departure Information** sections **Visible** on the registration form and change the **Order** in which they appear on the form.

Registrant Tab

The **Registrant** tab of **Event Registration** allows you to view any **Unapproved Registrants**, **Unapproved Until Payment Received** and **Approved Registrants**.

The **Unapproved Registrants** can be approved by placing a check in the **Approved** space and cancelled by clicking on the **Cancel** under the **Actions** section. You can also get such information as when the registrant registered, **Screen Name**, **First** and **Last Name**, and the registration **Type**.

When you click the **Screen Name** you will see and be able to modify the registration form that the registrant has submitted.

You can resend the event notification messages to the registrant or cancel their registration under the **Actions** section.

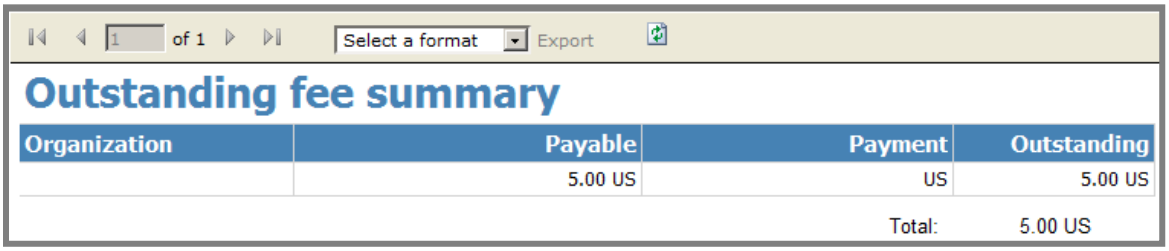
Available Spaces lets you know how many spaces are still open for registration for the event.

Reports

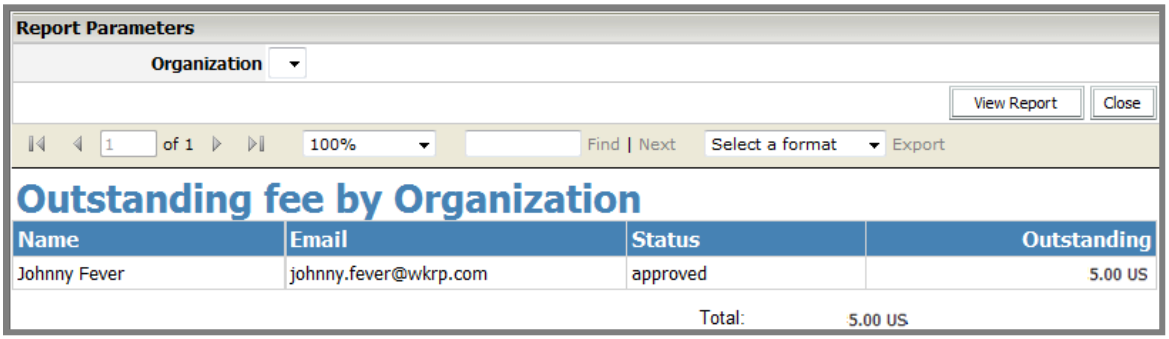
As an Administrator or Event Registration Author, you will have access to the following reports for the event. To view a report simply select the options that are presented to you when you select the type of report from the menu and click **View Report**.

You can export the reports as Excel or PDF files. Simply click the **Select a format** dropdown, choose your desired format and click **Export**.

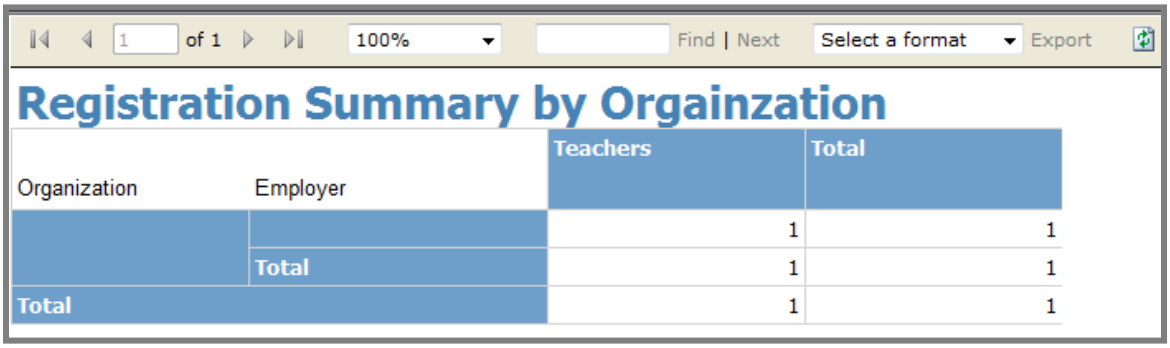
Outstanding Fee Summary: Shows outstanding fees for your sessions.



Outstanding Fee by Organization: Shows the outstanding fees by organization.

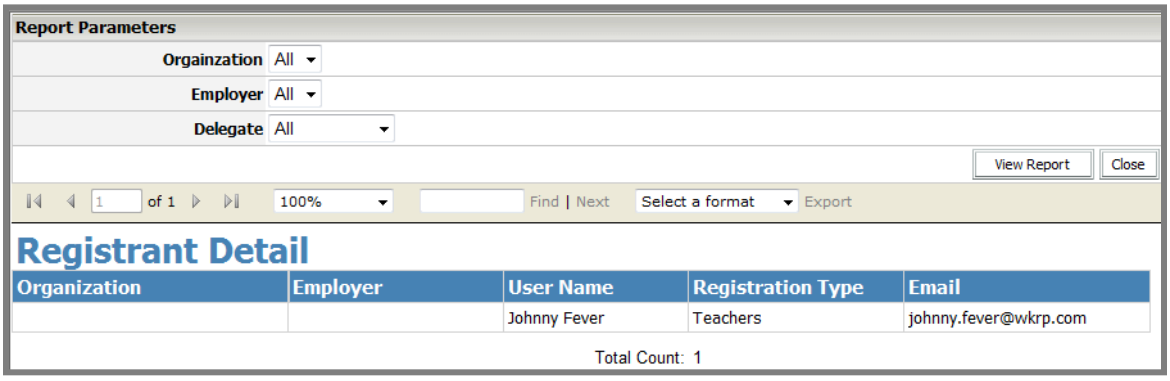


Registrant Summary: Shows by organization how many registrants have registered and by which **Registration Type**.



Organization	Employer	Teachers	Total
		1	1
	Total	1	1
Total		1	1

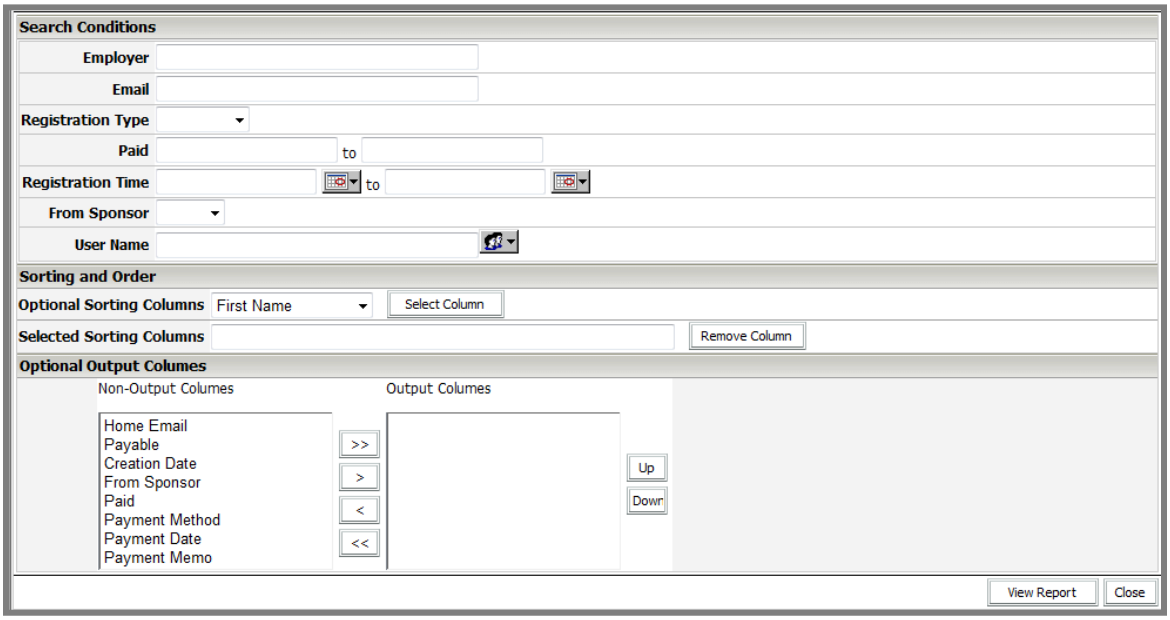
Registrant Detail: Details the registrants that are registered to your event



Organization	Employer	User Name	Registration Type	Email
		Johnny Fever	Teachers	johnny.fever@wkrp.com

Total Count: 1

Agenda Registration Detail: Shows which registrants are registered for which sessions for the event.



1 of 1 100% Find | Next Select a format Export

Agenda Registration Detail

Name	Organization	Employer	Registration Type	Email	Introduction To Event Registration	Event Registration Hands On Practice	Question Period
Johnny Fever			Teachers	johnny.fever@wkrp.com	Y	Y	Y

Total: 1

Cancellation Report: Allows you to see who has cancelled the registration for your event either by the registrant or registration contact.

1 of 1 100% Find | Next Select a format Export

Cancelled Registrations Information

Name	Email	Registration Type	Cancelled On

Total: 0

Dietary Summary: Shows a summary of the preferences and how many registrants have **Dietary Restrictions** such as kosher or vegetarian.

1 of 1 100% Find | Next Select a format Export

Registration Summary by Dietary

Dietary	Registrants
No Preference	1
Count:	1

Dietary Detail: Provides a more detailed report of the **Dietary Preference** of registrants.

Report Parameters

Dietary Preference All

View Report Close

1 of 1 100% Find | Next Select a format Export

Dietary Details

Dietary Preference	Name	Email
No Preference	Johnny Fever	johnny.fever@wkrp.com

Parking Summary: Shows a summary of parking required for your event.

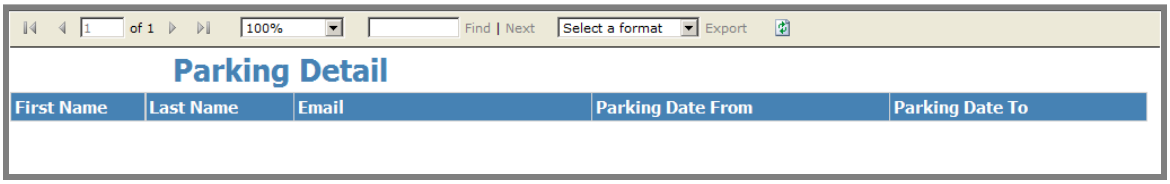
1 of 1 100% Find | Next Select a format Export

Parking Requests

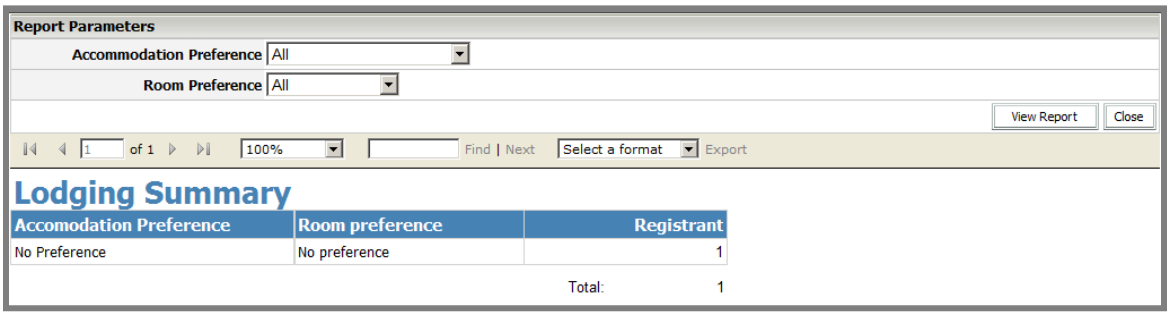
Date	Parking Space Needed

Total:

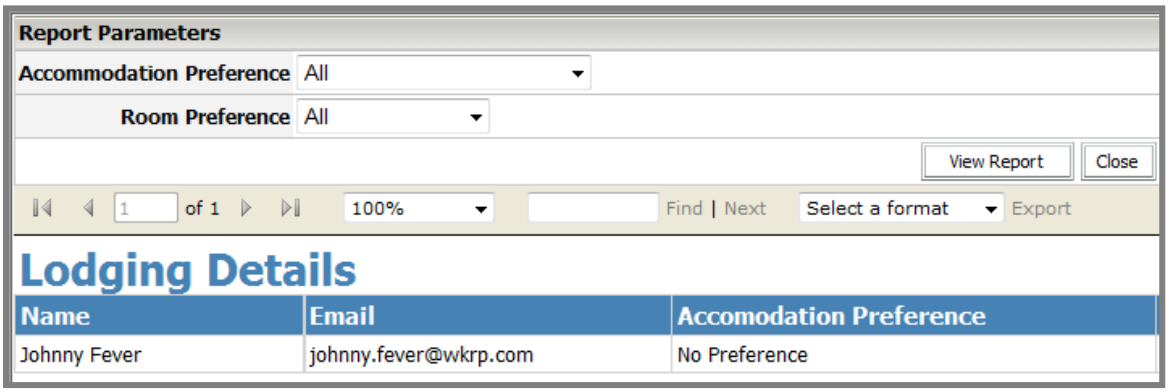
Parking Detail: Allows you to see which registrants require parking on which days.



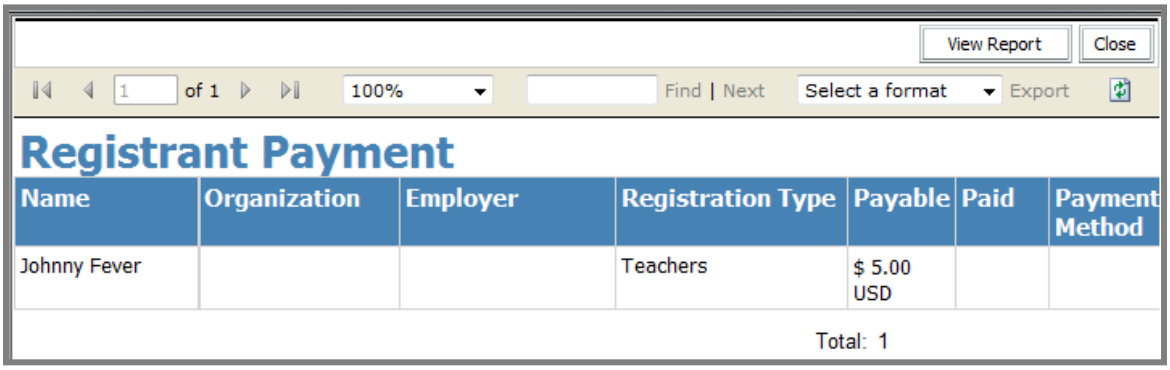
Lodging Summary: A summary report of registrants' lodging needs.



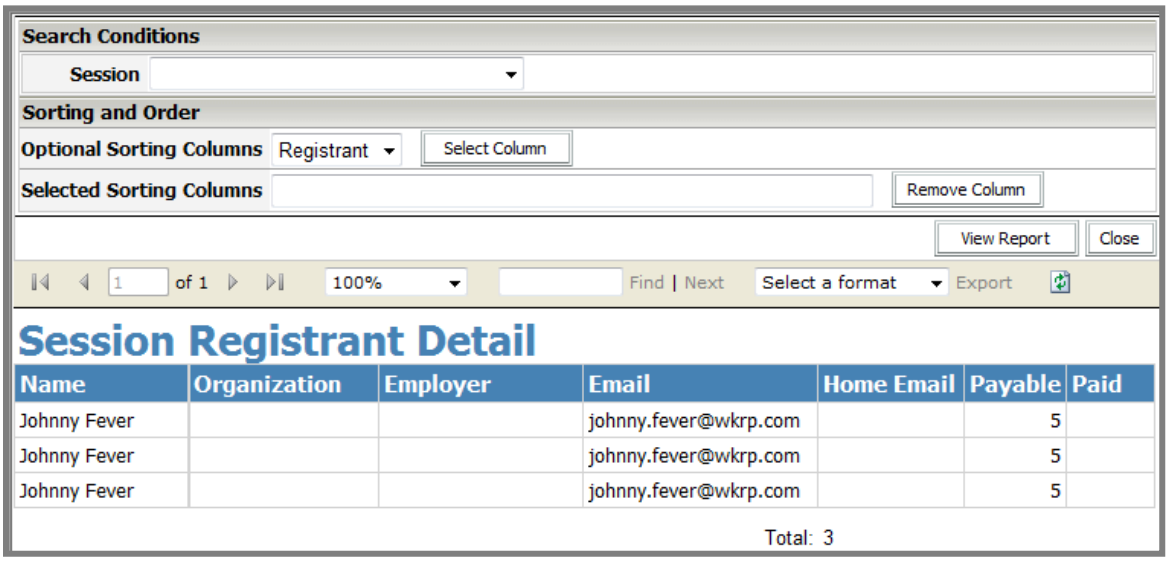
Lodging Details: A report listing the lodging that is required per registrant.



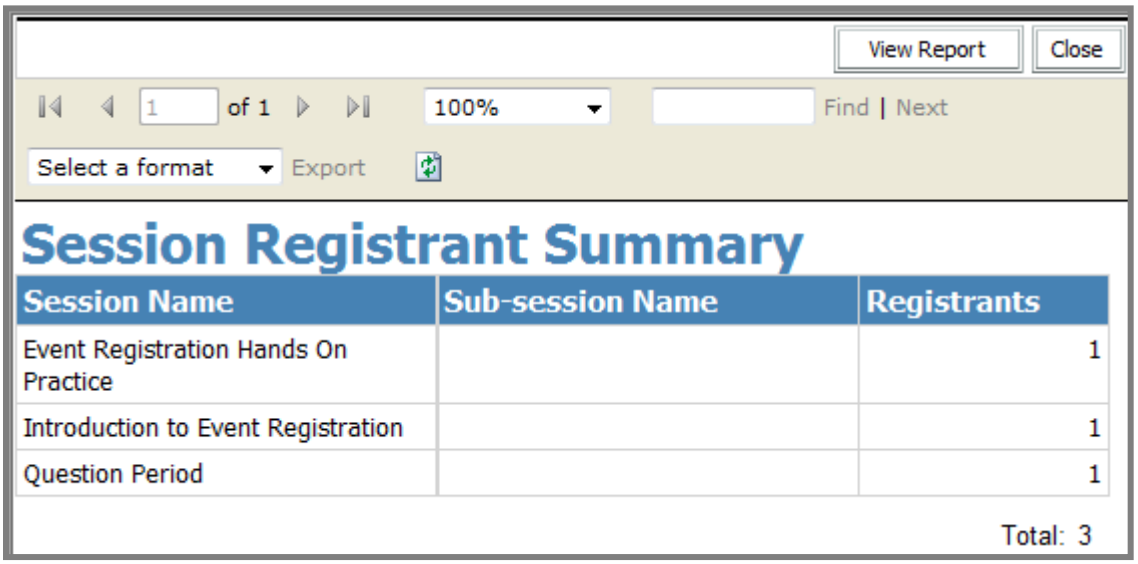
Registrant Payment: Shows the registrants' payment details.



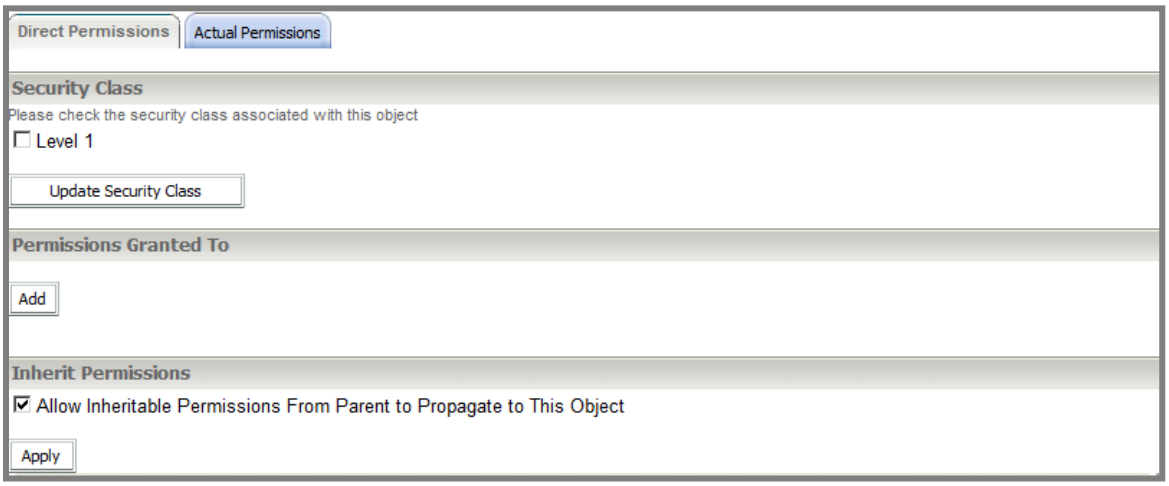
Session Registrant Detail: Shows the session and the registrants that are registered with full details.



Session Registrant Summary: Provides a summary of how many registrants are registered for each session.

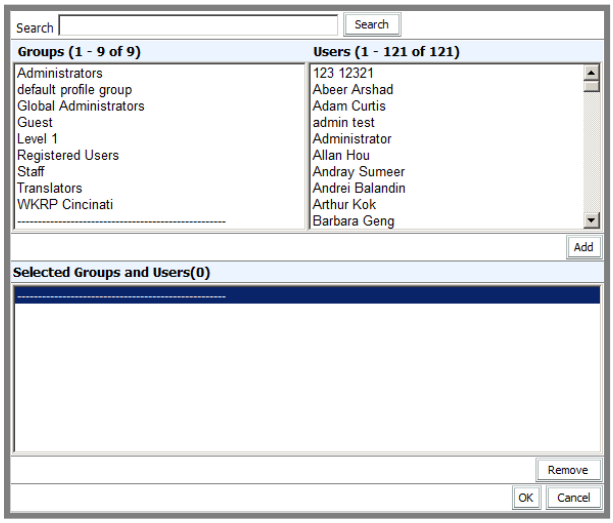


Configuring Event Security



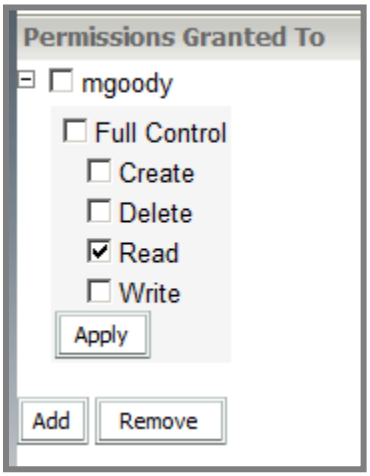
Administrators or event creators have the ability to assign permissions to users to allow them to edit or modify the event or be granted access to the event registration. To make changes to the security of an event, click on the **Security** tab.

To assign a user click **Add**, select the username or group of users and then click **Add** and then **OK**. If you want to remove a user or group click **Remove**.

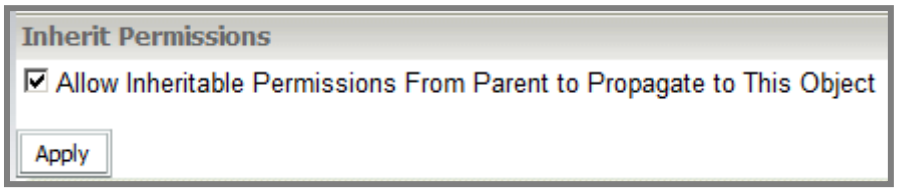


To assign permissions click the ⊞ icon next to the user or group and select any combination as required. **Read** allows the user to only read and register; **Write** allows the user to make changes to the event, however they are not able to create an event or change the registration form; **Create** allows the user to create events and make modifications to the registration form; and **Delete** allows the user to delete or cancel items on the event registration form or in the event details, agenda sessions, and registrants. **Full Control** gives the user all the

Read, **Write**, **Create**, and **Delete** permissions and also allows the user to assign these permissions to other users.

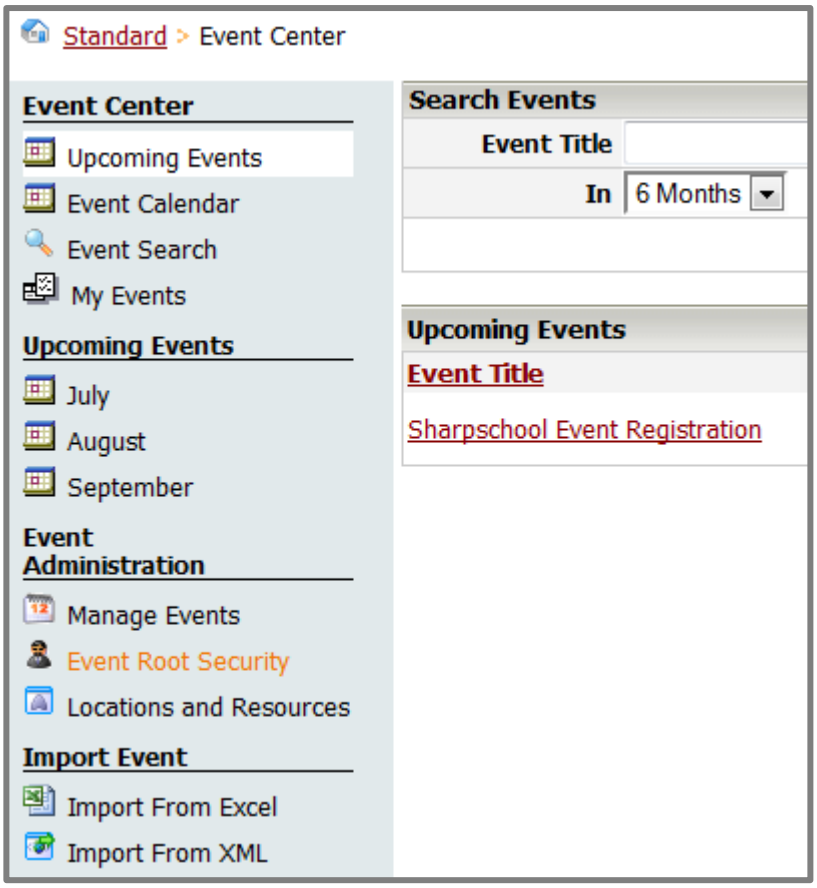


Allow Inheritable Permissions From Parent to Propagate to This Object will assign permissions based on the system permissions. In other words, whatever permissions a user has under **Administration** -> **Site Administration** -> **Security** will be inherited in Event Registration. By default a registered user will have **Read** access. If you want a user to be an event coordinator or have administrative permissions for the event add them to the **Permissions Granted To** list and provide them with the desired level of control.



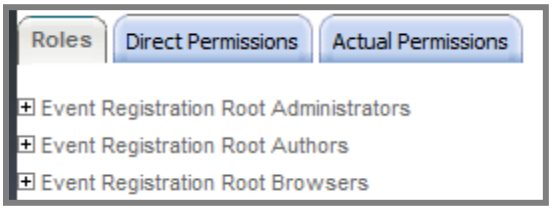
Configuring Event Root Security

This section controls permissions for **Event Registration**. Here administrators can assign event administrators and authors. To access these options, go to the Event Registration page and click **Event Root Security**.



The **Roles** tab:

1) **Administrator:** These users have complete control of the event
2) **Authors:** Can co-author content for the event
3) **Browsers:** Encompasses all users who can view and register for the event



Note: You must include the Guest user in the **Browser** role if you wish your events to be public.

The **Direct Permissions** tab lists the groups and/or users who have been assigned permissions to the event you are currently viewing. Here, you have the ability to **Add** and **Remove** permissions, and also inherit permissions for groups and/or users.

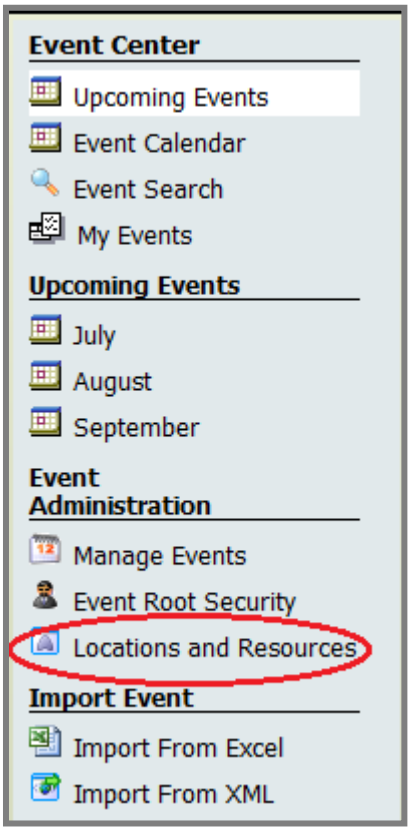
The **Actual Permissions** tab lists the individuals and groups who have inherited access to the event you are viewing.

You can also refer to *Chapter 1 – SitePublish (User Guide)* for more information regarding SharpSchool permissions and security.

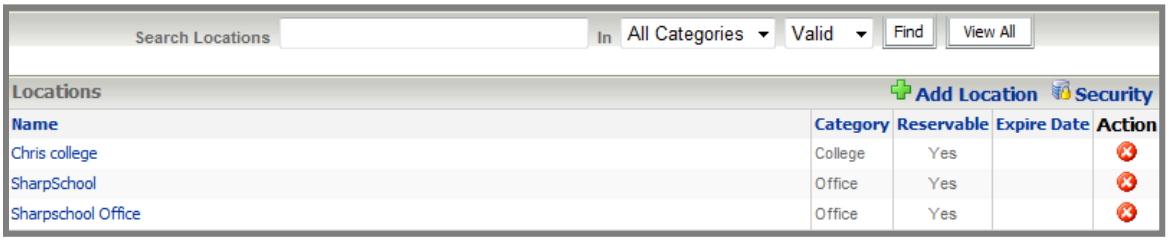
Creating Locations and Resources

Administrators can create **Locations** and **Rooms**. These locations can then be selected while creating events.

To access the locations and resources click **Locations and Resources** under **Event Administration** on the left hand navigation.



Once you click on **Locations and Resources** you will see the screen below:

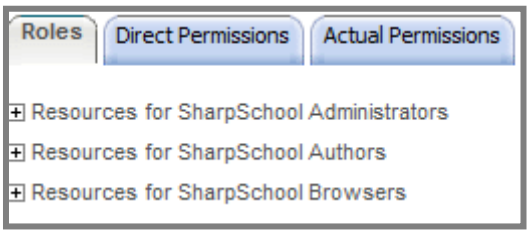


Search Locations

The **Search Locations** field allows you to search for a specific location by category name and validity.

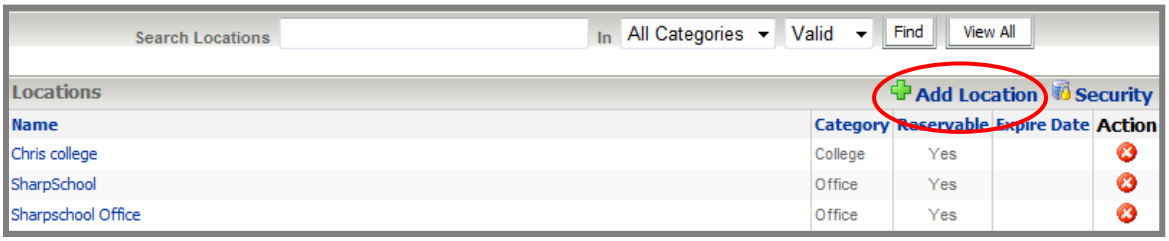
Security

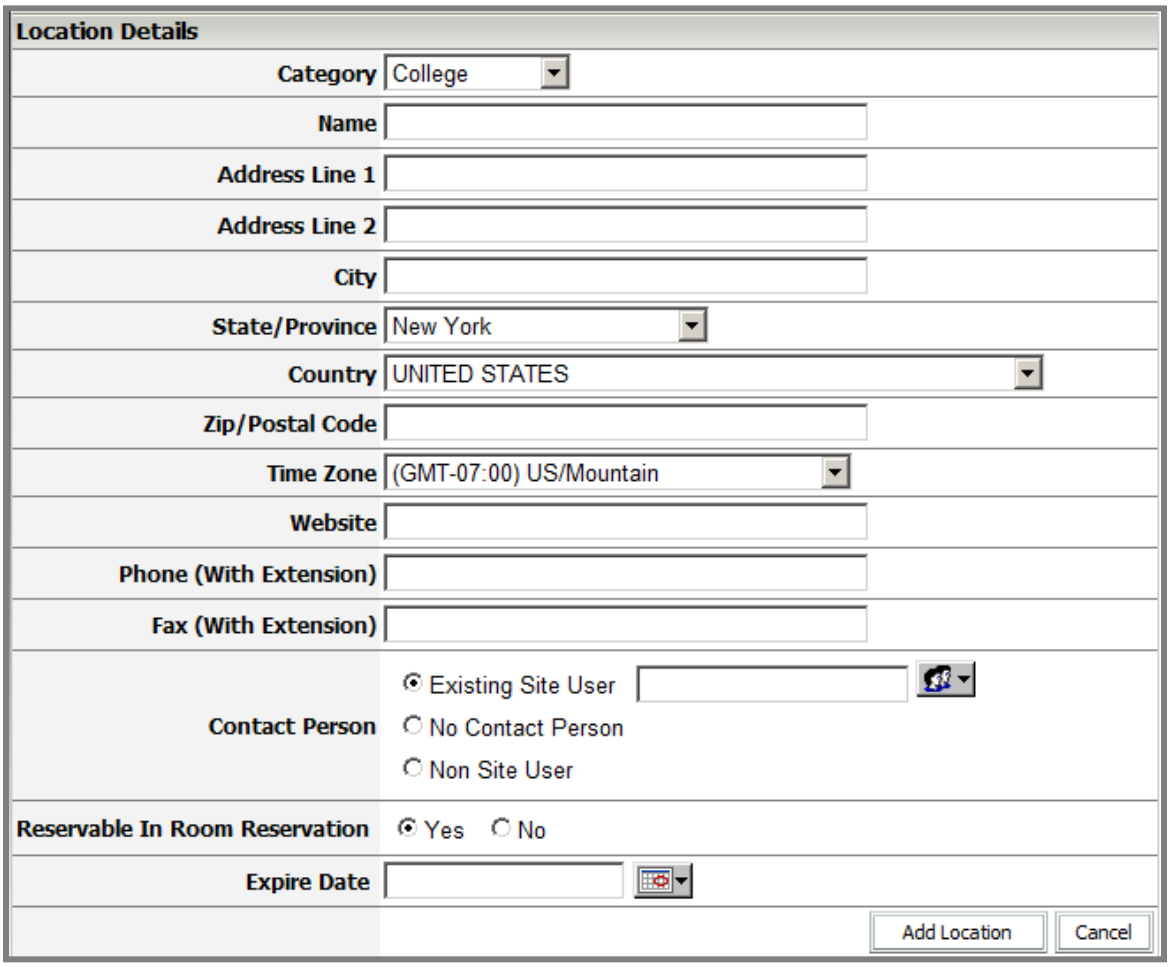
The security link will allow administrators to assign permissions to users to be allowed to create, edit, view or delete locations for the Event Registration. For more information on how these permissions work see *Configuring Event Root Security* on page 35.



How to create a location

To add a new location click on **Add Location**.





Fill out the form with the required information such as **Category**, **Name**, **Address**, **City**, **State/Province**, **Country**, **Zip/Postal Code**, **Time Zone**, **Website**, **Phone** and **Fax** numbers.

When filling out the **Contact Person** for the location you can select the following options:

Existing Site User: Select a user from the list of users available on your website

No Contact Person: Do not choose a contact person

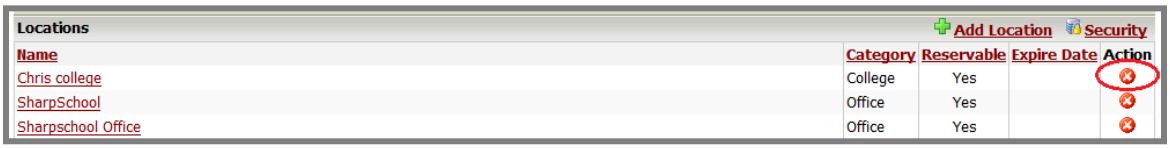
Non Site User: Allows you enter someone who is not a registered user on your website. Enter in the **First** and **Last Name**, **Office Phone Number**, **Mobile Phone Number** if applicable and **Email Address**.

If applicable enter in an **Expire Date**. Once the **Expire Date** has passed the location will no longer be available for reservations.

Once you have completed filling out the form, click on **Add Location**.

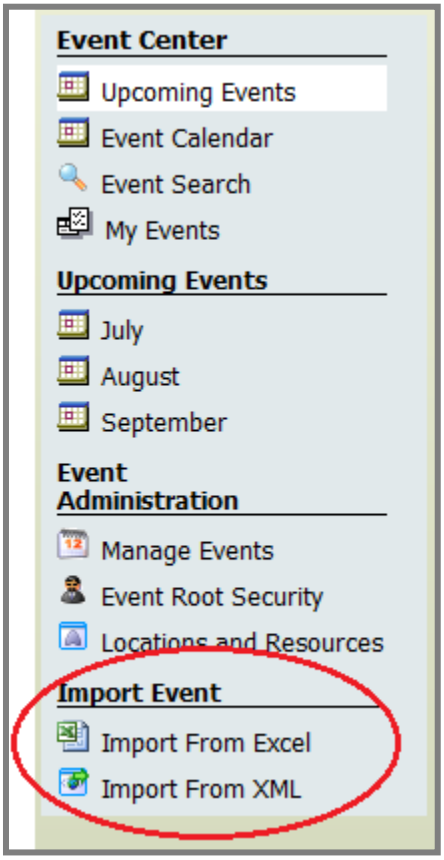
Deleting a Location

If you want to edit your location simply click on the name. To delete the location, click on **Delete** under the **Action** column.

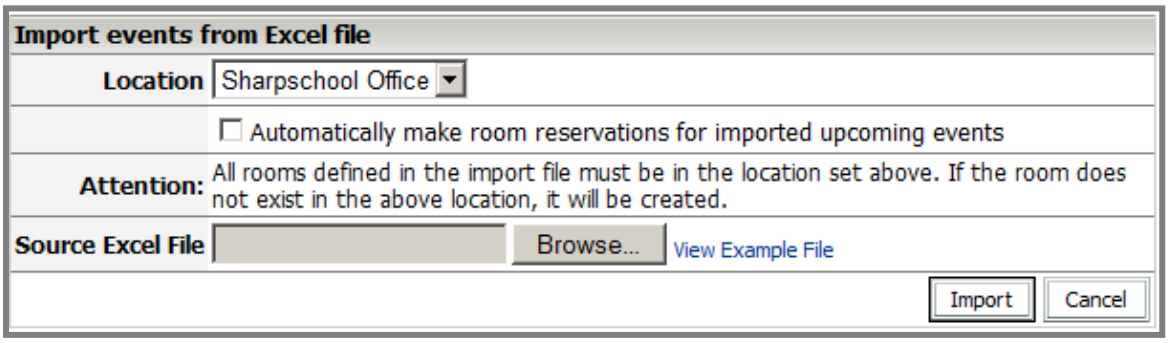


Importing Events

You can import events that are saved in Excel or XML format from the left hand navigation under the **Import Event** section.



From Excel



1) Click **Import from Excel** from the left hand navigation under **Import Events**.
2) Choose the location where you wish to import your event.
3) If required check **Automatically make room reservations for imported upcoming events**.
4) Click **Browse**, locate your file and click **Open**.
5) Click **Import** to complete.

Tip: If you need an example of what you require for the Excel spreadsheet click **View Example File**.

From an XML File

1) Click on **Import from XML** from the left hand navigation under **Import Events**.
2) Click on **Browse**, locate your file and click **Open**.
3) Click on **Import** to complete.

Tip: If you need an example of what you require for the XML spreadsheet click **View Example File**.